At Home Caregiver Benefit Handbook

A guide to the **At Home Caregiver Benefit Program** in Prince Edward Island



About this Handbook

This handbook is for people who are receiving, or who may want to apply, for the At Home Caregiver Benefit. It can help you understand:

- How the At Home Caregiver Benefit Program works
- Eligibility criteria
- The application process

This handbook gives basic information. The details of your application will depend on your situation. Each application is different and unique.

Interested in applying?

Questions about

eligibility criteria?

Contact us:

Phone: (902) 367-3893

Toll Free: 1 (800) 371-8245

Email: caregiverbenefit@gov.pe.ca

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What is the At Home Caregiver Benefit?

The At Home Caregiver Benefit recognizes the important role of unpaid caregivers.

The program provides financial help to primary caregivers of those living at home with high ongoing care and support needs and who are at high likelihood of admission to a long-term care home (the "care recipient").

Eligibility will be assessed by Home Care. If both the care recipient and the primary caregiver are eligible, the care recipient will receive between \$250 to \$1,500 per month, depending on their household income. The care recipient will make the payment to the primary caregiver.

(See next page for eligibility criteria).

Who is a primary caregiver?

A primary caregiver is someone who provides or coordinates a significant amount of unpaid, ongoing support to a care recipient. Primary caregivers may be family members, friends, or neighbours, and they may live with the care recipient, or in a separate household.

Primary caregivers offer many types of support. Eligible care recipients will likely require assistance from their primary caregiver with activities of daily living such as bathing, dressing and meal preparation.

Who is eligible for the At Home Caregiver Benefit?

An eligible primary caregiver must:

- ✓ Be 18 years of age or older and play the main role in providing or coordinating the ongoing care of the recipient
- ✓ Not currently paid to provide care to the recipient
- Be a resident of PEI with a valid health card (or have applied for a health card)
- ✓ Be a permanent resident of Canada
- Be assessed by Home Care as having high ongoing care and support needs and a high likelihood of admission to long-term care.
- ✓ Be a resident of PEI with a valid health card (or have applied for a health card)

An eligible care recipient must:

- ✓ Be 65 years of age or older*
- ✓ Have an up-do-date Canada Revenue Agency (CRA) Tax Notice of Assessment
- ✓ Be eligible and agree to receive Home Care Services
- ✓ Not be a current resident of community care, long-term care, or any other residential facility
- ✓ Agree to the terms and conditions of the At Home Caregiver Benefit

*Note: Individuals less than 65 years of age, who meet clinical eligibility as determined by a Home Care assessment, may also be eligible and will be discussed on a case-by-case basis.

Understanding the At Home Caregiver Benefit

What if the care recipient is unable to participate in the financial assessment?

If the care recipient is unable to participate in the financial assessment due to illness, age, or another reason, an agent can act on their behalf.

Who can act on the care recipient's behalf?

The agent can be someone close to the care recipient, such as a spouse, adult child, sibling, or an individual with a legal Power of Attorney granting them financial authority over the care recipient's affairs.

For an agent to act on behalf of the care recipient, they will need to sign an Agreement of Agent form when meeting with a Supports Coordinator at the Department of Social Development and Seniors. This form establishes the agent's legal authority to handle the application and financial assessment process for the care recipient.

How do I know if I qualify for the benefit?

Home Care staff will determine your eligibility through a clinical assessment that is designed to fully understand a person's care and support needs. The assessment results can help to create a care plan.

Do I need to reapply every year?

No, however, each year Home Care will reassess your care and support needs using the clinical assessment, and your Supports Coordinator will review your CRA Notice of Assessment to confirm the amount of the benefit you will receive.

Can more than one person be my primary caregiver?

One benefit payment will be paid to the care recipient. The care recipient will make the payment to their primary caregiver.

What is a caregiver logbook?

As a part of the program, primary caregivers will be asked to complete a short entry in a caregiver logbook each month. The form will ask about the type of help provided and the approximate number of hours of care provided. The care recipient may be asked for these forms at any time to assist with the program evaluation. The caregiver logbook will be provided by the Department of Social Development and Seniors at the intake appointment.

How is my benefit amount decided?

The benefit amount is based on the **care recipient's** income. A Supports Coordinator will use the income information on line 23600 of the care recipient's (and their spouse's, if applicable) CRA Income Tax Notice of Assessment to determine the benefit amount.

Why do I need an up-to-date tax assessment?

An up-to-date tax assessment is necessary to accurately calculate the benefit amount. The Supports Coordinator will use the income figure from line 23600 of the care recipient's (and their spouse's, if applicable) tax return.

What if I don't have an up-to-date tax assessment?

Contact the Canada Revenue Agency (CRA) at 1-800-959-8281 for information on how to update your personal tax filing.

How is the benefit paid?

The benefit will be paid to the care recipient by electronic funds transfer or cheque. If requested, the benefit can be paid directly to the primary caregiver on behalf of the care recipient.

Do I need to be on the wait list for long-term care to receive the benefit?

No, you do not need to be on the wait list for long-term care to receive the At Home Caregiver Benefit, but Home Care will assess your service and support needs to determine if you qualify.

How will the funding for the At Home Caregiver Benefit affect my taxes?

Most care recipients receiving the benefit will receive a T5007 tax slip (Statement of Benefits). To learn about T5007 tax slips see:

PrinceEdwardIsland.ca/sites/default/files/publications/t5007 information sheet final.pdf

The CRA considers the At Home Caregiver Benefit **exempt** from the income of the care recipient if both the following conditions are met:

- The care recipient resides in the caregiver's primary residence;
 and
- The care recipient and caregiver are not related.

If these conditions are met, the At Home Caregiver Benefit payments will not be included in the care recipient's income and you will not be issued a T5007 tax slip.

Will this benefit affect my eligibility for other programs and benefits, such as Guaranteed Income Supplement (GIS) and the Seniors Independence Initiative (SII)?

The amount shown on the T5007 tax slip is not taxable but is used to calculate eligibility for tax credits like the Goods and Services Tax (GST) credit and Canada Child Benefit, if applicable.

Amounts on the T5007 tax slip should not impact the care recipient's eligibility for programs such as Old Age Security (OAS) or the Guaranteed Income Supplement (GIS). If you have further questions, seek the advice of a tax professional.

Amounts on the T5007 tax slip will not affect financial assistance received through the Seniors Independence Initiative.

Is there an appeal process if I am deemed ineligible for the AHCB?

If you are not satisfied with the decision related to your **financial application** you have a right to appeal. Talk to your Supports Coordinator at the Department of Social Development and Seniors if you have questions.

Rights & Responsibilities

Rights

When you participate in this program you have the right to:

- Be treated with respect
- Expect that your personal information and health information will be kept private
- Receive the benefit if you are determined to be clinically eligible for the program
- Receive a monthly payment in the amount that is determined by your CRA Income Tax Notice of Assessment.

Responsibilities

Primary Caregiver:

- Review and be aware of the AHCB program policies
- > Assist care recipient in completing application if required
- Work with Home Care to understand the care recipient's plan of care
- Provide care and support to the care recipient
- Complete a short entry into a caregiver logbook each month

Care Recipient/Agent:

- Review and be aware of the AHCB program policies, if able
- > Complete benefit application, if able
- Work with Home Care to develop and participate in the plan of care, if able
- Provide the AHCB payment to your primary caregiver
- Advise your Supports Coordinator of a change in caregiving status such as:
 - Admission of primary caregiver or care recipient to hospital or facility for respite (for more than 30 days)
 - Primary caregiver leaves or goes on vacation for more than 30 days
 - If primary caregiver or care recipient no longer meet the eligibility criteria
 - If the primary caregiver is no longer able to provide care to the care recipient

- Permanent admission of the care recipient into a community care facility or long-term care home
- Death of the care recipient
- Any other situation that prevents the primary caregiver from providing care for more than 30 days

Important Reminders:

Report all changes to your financial situation or caregiving situation right away.

File your Income Tax Return each year.

Applying for the At Home Caregiver Benefit

Generally, the application process for the At Home Caregiver Benefit will consist of the following steps:

- Call the Department of Health and Wellness at 1-800-371-8245 for more information and to be connected to your local Home Care office.
- Home Care will review your file to see if you have had an
 assessment completed within the past year. If you have not
 been assessed within the past year and it's appropriate, an
 assessment will be scheduled.
 - a. If the assessment confirms that you are eligible and you agree to receive Home Care services, Home Care will submit your information to the Department of Social Development and Seniors on your behalf (with your consent). You will then need to follow up with the Department of Social Development and Seniors about your application.
- Call the Department of Social Development and Seniors to set up an intake appointment with a Supports Coordinator to complete your application. (See next page for information about the intake appointment)
- 4. At your intake appointment, the Supports Coordinator will:
 - a. Explain the program
 - b. Enroll you in the program
 - Determine your monthly benefit based on your household income. (Remember to have your latest CRA Notice of Assessment on hand. This will be used to calculate your monthly benefit amount.)
- Once enrolled, the Department of Social Development and Seniors will issue your monthly payment electronically or by cheque (after the first month).

What is an Intake Appointment?

An intake appointment is your first meeting with a Supports Coordinator to start your application for the AHCB program. This meeting can take place at a program office or at your home.

During the appointment, you will:

- Complete your application with the help of the Supports Coordinator.
- Provide necessary documents to support your application and determine your benefits. (See the next page for a list of documents.)
- Learn about the program and ask any questions you have.
- Sign the Applicant Declaration/Agreement form, a legal document required for program enrollment. By signing this form, you agree to follow the program rules and allow verification of your information.
- If applicable: Provide your Supports Coordinator with a Confirmation of Caregiver form signed by your primary caregiver. You may be provided this form before your intake appointment, or you may be provided this form at your intake appointment, to be signed and returned by your primary caregiver.

The coordinator will review your application and documents to ensure everything is complete and determine the amount of your benefit.

It is important to understand the Applicant Declaration before you sign.

Please ask questions.

Documents Checklist

Documents to take to your intake appointment:

Document	This applies to	✓
CRA Notice of Assessment	Care recipientand spouse (if applicable)	
Direct deposit information	Care recipient*/agent	
PEI Health card number	Care recipient/Caregiver	
Social Insurance Number	Care recipient	
Signed Confirmation of Caregiver form**	Primary caregiver	

^{*}Unless you request that the payment be made directly to the primary caregiver

Documents to take to your <u>annual reassessment</u>:

Document	This applies to	<
Caregiver Logbook	Primary Caregiver	
CRA Notice of Assessment	Care recipient and spouse (if applicable)	

^{**}This form may be provided to you <u>before</u> your intake appointment **or** you may be provided with this form <u>at</u> your intake appointment, to be signed and returned by your primary caregiver.

Overpayments and Repayment

What is an Overpayment?

An overpayment occurs when an applicant receives more financial assistance than they are entitled to.

Repayment of Overpayments

All overpayments must be repaid. The Overpayment Coordinator will determine the most appropriate repayment method based on your circumstances.

Recovery Options

- (1) Lump Sum Repayment You can repay the entire overpayment amount at once.
- (2) Monthly Withholding A portion of your monthly benefit will be withheld until the overpayment is fully recovered. The minimum monthly withholding amount is \$25, with a maximum of \$100. The Overpayment Coordinator may adjust this amount based on your specific situation.

If you have been notified of an overpayment, please contact your Supports Coordinator as soon as possible to discuss your repayment options. They will be happy to answer any questions you may have and assist you in resolving the overpayment.

Additional Programs & Services

AccessAbility Supports – Helps Islanders living with disabilities. Help is available in five areas of support including: Personal, Housing, Community, Caregiver, and Financial.

Home Care Programs and Services – Provides a range of health care and support services including home support, adult day programs, respite, nursing support, occupational therapy, physiotherapy, social worker, and dietitian support. Contact your local Home Care office for more information. (See last page for contacts and locations of local Home Care offices.)

Seniors Housing Program – Many seniors find that their housing needs change over time. You may find your income is less than in earlier years or you may find it more difficult to maintain your home. You are eligible to apply if you are aged 60 and older, or 55 and older and have a disability. You will be chosen based on your income, assets, health, age and present housing situation.

Seniors Independence Initiative – Provides financial assistance for practical services making it easier for seniors to remain in their own homes and communities. Help is available for services such as light housing keeping, meal preparation, or snow removal and complements supports provided to seniors by family members and other government programs for daily unmet needs.

Seniors Hearing Aid Rebate Program – The program covers cost-effective hearing aids that meet the applicant's basic hearing needs, to a maximum payable rebate of \$6,000 per individual. Hearing aids are payable once every 5 years.

Seniors Safe @ Home Program – This program provides financial assistance to help with the cost of renovations that are required to improve accessibility and promote seniors residing safely at home (up to \$10,000).

For more information on Home & Community Services:

211 PEI

This is an information and referral service that helps Islanders connect to community, social, and government support and services available across PEI quickly and easily. 211 PEI is free, confidential, and available in more than 100 languages 24/7, 365 days a year.

Phone: 211 Website: www.pe.211.ca

Seniors Navigator

The Seniors Navigators can:

- Assist with information on services and programs;
- Direct to the appropriate service and programs contacts;
- Help with completing applications for services and programs;
- Help to direct seniors' concerns to the appropriate place
- <u>PrinceEdwardIsland.ca/en/information/social-development-and-seniors/seniors-navigator</u>

Seniors Navigator East

Seniors Navigator West

Email: seniors@gov.pe.ca Email: seniors@gov.pe.ca

Phone: (902) 303-0450 Phone: (902) 213-5820

Toll Free: 1-866-770-0588 Toll Free: 1-866-770-0588

PEI Seniors Guide

A handbook of information about programs and services for seniors living in Prince Edward Island published by the Seniors' Secretariat.

For information on the services, supports, and resources available to Islanders and their caregivers, check out the chapter on Caregiving (Chapter 5). This chapter provides information and contacts for respite services, support groups, home care, end of life care, and much more.

Guides are available at AccessPEI locations. They can also be requested through the Seniors Navigators, or the Seniors' Secretariat:

Phone: (902) 629-3785
Toll-free: 1-866-770-0588
Email: seniors@gov.pe.ca

<u>The PEI Seniors Guide can also be found online:</u>

<u>PrinceEdwardIsland.ca/en/publication/prince-edwardisland-seniors-guide</u>

Home Care Offices

Souris

17 Knights Avenue

Phone: (902) 687-7096

Charlottetown

165 John Yeo Drive

(902) 368-4790

Montague

6 Harmony Lane

(902) 838-0786

Summerside

Wedgewood Manor

310 Brophy Avenue

Phone: (902) 888-8440

O'Leary

Community Hospital

14 MacKinnon Drive

Phone: (902) 859-8730

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