



Passport Program Guidelines for Adults with a Developmental Disability and their Caregivers

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What is the Passport program?

Passport is a reimbursement program that helps adults with a developmental disability be involved in their communities and live as independently as possible; this is done by providing funding that can be used to purchase services and supports for community participation, activities of daily living and person-directed planning. The program also provides funding for primary caregivers of an adult with a developmental disability to access respite services and supports.

The **key goals** of the Passport program are to:

- Foster independence by building on individuals' abilities and supporting community participation, social and daily living skills.
- Increase opportunities for participation in the community with supports that respect personal choices and decision-making, and help people achieve their goals.
- Promote social inclusion and broaden social relationships using community resources and services available to everyone in the community.
- Help to support life transitions such as the transition from youth to life as an adult in the community.
- Support families and caregivers of an adult with a developmental disability so they can continue in their supportive role.

The services and supports funded under Passport are guided by the following principles:

- **Person-centred/directed** – services and supports build on individuals' strengths and are responsive to their preferences, needs and values.
- **Choice and Flexibility** – individuals identify and participate in activities that are meaningful to them. Direct funding is available to give Passport participants more options in how supports are provided.
- **Strong Families and Caregivers** – the individual's family and personal support network is recognized as the primary support for adults with a developmental disability.
- **Fairness and Equity** – funding amounts are based on a provincial application, needs assessment and funding formula.
- **Reasonable and Appropriate** – admissible expenditures should be cost-effective and aligned with the support needs of the individual.

- **Accountability** – individuals, families and service delivery agents must use Passport funding for its intended purpose and comply with program spending rules and reporting requirements as outlined in these guidelines.

Can I receive Passport funding?

If you are an adult, 18 years or older, who is eligible for developmental services and supports funded by the Ministry of Children, Community and Social Services, you may receive at least a minimum amount of annual Passport funding.

You can contact the Developmental Services Ontario (DSO) office in your region to apply for Passport funding. The DSO will determine your eligibility to receive ministry-funded adult developmental services. Once eligibility is confirmed and you have consented to a referral to the Passport program, the DSO will refer you to the local Passport agency to receive the \$5,500 annual allocation through the program.

For more information on eligibility and how to apply for adult developmental services, including Passport funding, go to <https://www.dsontario.ca/>

How much funding is available?

In some cases, it may be possible to receive more than \$5,500 per year in annual Passport funding. To determine if you are eligible for any additional Passport funding above \$5,500, you must first complete an application package at the DSO, including a needs assessment.

When the Developmental Service (DS) application is completed with the DSO, the information that is provided is used to determine funding amounts through an automated process, called the “mapping tool”. The mapping tool produces scores that are matched against a funding table that identifies the amount of Passport funding you are eligible to receive. Whether you receive more than \$5,500 will depend on your assessed need, priority level and available government resources. The maximum Passport funding amount that an individual can receive is \$44,275 per year.

To promote a fair and equitable service system, all applications for Passport are prioritized according to each person’s unique situation and available resources, giving the highest priority to people whose circumstances place them most at risk, based on various risk factors. It is important to keep your local DSO up to date about your current situation as changes in your circumstances can impact the amount of funding you are

eligible to receive. If your situation or support needs have changed, please inform your local DSO so they can re-assess you based on the most up to date information available.

How do I get started?

You will first need to accept your Passport funding approval. Then your Passport agency will help you with each of the steps to get you set up with your funding. This will include:

- Choosing your [Person Managing Funds](#)
- Selecting a [Service Option](#) that works best for you
- Completing the [Passport Service Agreement](#) and other necessary forms, such as setting up an automatic deposit with your banking institution and registering your support worker(s)

Who is the Person Managing Funds (PMF)?

You will need to choose a person who will be responsible for managing your funding. This person is called the **Person Managing Funds (PMF)** and every Passport recipient must have a PMF. You can designate yourself as the PMF or you can choose a trusted friend or family member to be your PMF. The PMF cannot be a person you pay to be your support worker for you.

The local Passport agency will work with you and/or your PMF to help you make decisions about your funding.

What are the Service Options to administer my funding?

There are three ways, or service options, to manage your Passport funding. You can select one of these options or a combination:

Self Administer Service Option

You can choose to **self administer** your funding which means you manage your funding on your own and/or with your PMF, develop your own support arrangements and hire your own support workers and service providers. You can hire a support worker on a fee for service arrangement or as an employer. See [Appendix C: Additional Resources](#) for more information about being an employer.

Transfer Payment Recipient Service Option

You can choose to receive direct supports from a ministry funded **Transfer Payment Recipient (TPR)** that you select. This means that the TPR delivers support directly to you, submits invoices to the Passport program and receives the payment on your behalf; meaning you do not have to pay upfront for services. The Passport agency can work with you and your PMF to arrange payments with a TPR that you choose.

Broker Service Option

You can choose a person, agency or organization to act as a **broker** to manage your Passport funding on your behalf. Your broker can help you with budgeting, submitting invoices on your behalf, and recruiting and scheduling workers for you. A broker cannot provide you with direct services paid for with your Passport funding.

What is the Passport Service Agreement?

All Passport recipients (or the person managing funds on your behalf) must sign a service agreement with their local Passport agency and the agency that processes Passport payments. This agreement describes your responsibilities and/or those of your chosen PMF. You cannot submit a claim for reimbursement until you have signed and returned the Passport Service Agreement to your local Passport agency.

How do I use my Passport funding?

The Passport program can support you to purchase admissible services and supports that can help meet your support needs and goals. A list of admissible services and supports are outlined later in these guidelines:

What does Passport funding cover?

It is your and your PMF's responsibility to ensure that your Passport expenses are admissible prior to purchasing them. If you are unsure if an expense is admissible for reimbursement under the program, you can connect with your local Passport agency for help.

How do I know what to spend?

Your annual Passport funding is allocated on a fiscal year basis, which is from April 1 of one year to March 31 of the following year. This means your funding crosses from one **calendar** year to the next. For example, the 2022-23 fiscal year corresponds to the period from April 1, 2022 to March 31, 2023.

You are reimbursed for admissible expenses purchased in the fiscal year up to the amount of your annual Passport funding. You may not carry over any unused funding from one fiscal year to the next.

Budgeting

If you manage your own funding, it is recommended you plan your budget for how you will use your funding to meet your support needs and goals. Some things to consider when developing a budget include:

- What you want to achieve with your funding (e.g., your support needs and goals). You can refer to any personal goals or interests you may have shared if you completed an assessment at the DSO.
- How you will spend your money (e.g., activities and supports to meet your needs and goals).
- When during the year you will spend your money (e.g., you may plan to spend some of your money each month throughout the year, or you may plan to spend most of it over the summer holiday period).
- The cost of the activities and supports relative to the total and remaining budget.

Your local Passport agency can work with you to help you identify services and supports that can help meet your support needs and goals and provide additional information and resources about preparing an annual budget.

How do I file a claim?

You can submit your Passport claims online using one of the free Passport e-filing platforms, eCLAIM or MyDirectPlan (MDP). These e-filing platforms guide you through the submission process and include tools to help you with budgeting and record keeping, and help you get paid faster than mail, fax, or email submissions. You can learn more about these options and how to sign up at the following links:

- eCLAIM <https://passportfunding.ca/learn-about-eclaim>
- MyDirectPlan <https://passportfunding.ca/learn-about-mydirectplan>

You can contact your local Passport agency if you need another way to file your claim.

Supporting documents

You will need to include supporting documents, such as **invoices** and/or **receipts** as part of your claim submission.

- An **invoice** is a document issued by the person or organization that provides you with a service to request payment. An **invoice** is issued before payment.
- A **receipt** is issued to you as proof that payment has been made. A receipt is issued after the payment is received.

Please note that credit card and bank statements are **not accepted** as receipts of payment.

Passport claim submissions are subject to regular reviews and it is important that you keep records of your Passport expenses as you will be required to provide records as part of a review. These records can include documents such as receipts, invoices and in the case of goods, proof of delivery.

If you submit mileage claims, you should maintain a record or log of your mileage and the associated activities; this will be the documentation you can provide if your claim is selected for review.

For more information about filing your claims visit www.passportfunding.ca or contact your local Passport agency.

How do I get paid?

You are paid when you submit claims. You are encouraged to submit your claims monthly. This will allow you to get paid more regularly and better manage your Passport budget throughout the year.

You and your PMF can choose to be reimbursed by automatic bank deposit or by cheque (mail). Your Passport agency will work with you to set up your preferred payment option.

Sometimes you might be paid in one fiscal year, but the expense comes out of the following fiscal year. This is because of Modified Accrual Accounting (MAA). This means that you get paid for your claim when you submit it but that the funds are paid out of your budget for the fiscal year when the activity/service occurs, or the goods are delivered, which might be the next fiscal year. An example of this is paying for a camp in January that will take place in June. You are paid when you submit the claim in January, but as the service is provided in June which is in the next fiscal year, it will be attributed to that fiscal year's budget.

It is important when you are budgeting for your Passport funding to understand the rules of MAA. More examples of MMA are available in: [Modified Accrual Accounting \(MAA\)](#).

Repayment of funds

All items or services purchased with Passport funding must be admissible per the program guidelines. The Passport program reviews claims to determine admissibility/eligibility with the program guidelines. This review can happen before a claim is paid or after.

Where a claim has been paid and an expense is deemed inadmissible, and in the event you receive an over payment for an admissible expense, you are required to return the funds. In the event you are required to return funds, your local Passport agency will work with you and your PMF to select an available repayment option.

Financial assistance

Sometimes, paying for items or services and supports ahead of time may cause financial challenges. In such situations, you may be able to receive an advancement of your available funding to purchase admissible supports and services. You must reconcile any advances with receipts for any admissible expenses you purchase with the advance. If you are not able to reconcile your advance payment you will be required to return the advanced funds to the program. You can contact your local Passport agency for more information about an advancement.

Misuse of funds

Passport funding can only be used to meet the service and support needs of the eligible adult with a developmental disability and the respite needs of their caregivers, as set out in the Passport program guidelines and Passport Service Agreement.

The Passport agency may suspend or terminate funding where the person receiving or managing Passport funding does not comply with the terms and conditions of the Passport Service Agreement. Further information may be requested and law enforcement and/or legal action may be pursued in cases where Passport funds appear not to have been used in accordance with the Guidelines and Passport Service Agreement (e.g., submission of expense claims that appear to be misleading or false).

Your Passport agency may advise you that your service option for how you administer your funding may need to be changed, for example, where there are concerns about compliance with the Guidelines, Passport Service Agreement, etc.. Your Passport agency can work with you and your PMF to choose a different service option, such as a transfer payment recipient or broker.

You and your PMF are responsible for the re-payment of funds associated with the misuse of funds. If you are required to return funds, your local Passport agency will work with you and your PMF to select an available repayment option.

What does Passport funding cover?

The Passport program is designed to complement and work together with other government programs, resources, and sources of funding to provide a wide range of supports delivered. Passport funding can be used for the following categories of services and supports:

- Community Participation Supports
- Activities of Daily Living (ADL)
- Employment Supports
- Caregiver Respite
- Support Worker Hours and Expenses
- Transportation (to/from admissible activities)
- Technology
- Community Participation Support Supplies and Equipment
- Person-Directed Planning
- Administrative Supports

You can purchase your services and supports from different types of service providers, such as community service providers, developmental services agencies, private service and support providers, adult education providers, personal support workers and family members, friends, or neighbours.

Admissible Expenses

The following types of services and supports are examples of what Passport funding may be used to purchase. If you are unsure if an item is admissible for reimbursement under the program, please contact your local Passport agency for help.

Community Participation Supports

You can use your Passport funding to help you be active in your community. Funding can be used to participate in activities or attend events that interest you or take a class to help you learn a new skill or hobby. Activities and services can take place virtually or in person.

Community and Recreational Activities

Costs associated with recreation, leisure, social, cultural and athletic activities and other opportunities to support you to participate and join in community events and activities are admissible under Passport. This can include things such as:

- Fitness, recreational or activity memberships and fees
- Admission to museums and cultural attractions
- Fitness and sports and/or activity-specific classes
- Participation in sports leagues
- Hunting and fishing permits or licenses
- Taking a recreational class to learn a new hobby or skill
- Online educational and e-learning activities
- Educational courses and classes that are not OSAP eligible
- Activity based day and/or summer camps.

Live Event Tickets

Ticketed, live events such as live music, theatre, sporting events and other live entertainment events are admissible expenditures under the Passport program that can be reimbursed **up to a maximum amount of \$150** per ticket for a **maximum of two (2) tickets** per event, one for the recipient and one for the recipient's registered support worker. The Passport program will not reimburse the cost of a live event ticket above the per ticket cap of \$150.

If you have unique circumstances where you require more than one support worker to attend a live event, you may be reimbursed for an additional ticket(s) **up to a maximum amount of \$150 per ticket** with **prior approval** from your local Passport agency.

Activities of Daily Living (ADL)

You can use your Passport funding to pay for supports or purchase services or items that help you to be more independent in your day-to-day life, whether you live in a supportive living setting, with a caregiver, family member, a roommate, or on your own. Services can be delivered in person or virtually and can include things such as:

- Programs, classes, life skills coaching, and supports, including support worker hours that help you learn:
 - life skills such as literacy, personal hygiene and grooming, banking and managing money, using public transportation, meal preparation and home management skills
 - social and communication skills including computer skills
 - personal skills such as decision-making, self-advocacy, and assistance with self-care

Employment Supports

You can use your Passport funding to help you develop the skills you need to apply for a job and to support you to maintain a job. This includes pre-employment and other employment supports such as skills development, task and routine training, and job coaching.

Caregiver Respite Services and Supports

The primary goal of caregiver respite services and supports is to help caregivers meet their own needs and support a healthy relationship between the person receiving care and the caregiver.

Examples of caregiver respite services and supports include:

- Help for the person with a developmental disability with activities of daily living such as personal care needs.
- Supervision of the person with a developmental disability.

Caregiver respite services and supports may last from a few hours to overnight. They may be provided during the day, evening or weekend and can be received either in-home or out-of-home.

Respite funding is intended to provide relief for an unpaid primary caregiver who provides regular, in person, day to day, caregiving support to their family member. If you are in receipt of Passport funding and you move into a Ministry-funded supportive living setting or other living arrangement (e.g., Long-term Care Home) where there is no unpaid primary caregiver providing in-person, day to day supports, the caregiver respite portion of your Passport funding will be removed from your annual funding amount.

Contact your local Passport agency if you are unsure if your situation qualifies for caregiver respite for your caregiver.

Note: Paid caregivers providing care as part of the Ministry-funded Host Family program may not receive respite under the Passport program.

Support Worker Hours and Expenses

Support Worker Hours

You can use your Passport funding to help you pay for supports provided to you by your support worker. This can include paying a worker to help you participate in social and recreational activities, job and work-related activities, volunteer activities and other supports that help you participate in the community.

Your support worker can also help you develop the skills and activities of daily living like meal preparation, personal hygiene, grooming, dressing, and training related to using the bus, banking and other life skills.

If you choose to employ your support worker directly, your Passport funding may be used to cover applicable employer costs (e.g., Canada Pension Plan, Employment Insurance and Workers Safety and Insurance Board premiums, vacation pay).

Support Worker Expenses

You can use your Passport funding to pay expenses of your support workers that they may have while providing you with support. This includes the cost of activity fees, tickets and entrance fees and transportation to accompany you during your activities. This includes transportation costs for your support worker to accompany you on a personal or family vacation. Please note that transportation costs for you to take part in a personal or family vacation are not admissible.

Support worker transportation costs are admissible only for the time they spend with you. Costs to get to/from their home/place of employment to you is not admissible.

The **Transportation** section of the guidelines includes more information about what types of transportation costs are admissible under the program.

In some circumstances, the cost of your support worker's meals while accompanying you to admissible Passport activities are allowed under the program.

The Ministry recommends that Passport recipients use the expense limits set out in the Government of Ontario's Travel, Meals and Hospitality Directive for government employees as a guide for support workers' expenses. The Directive may be viewed at: <https://www.ontario.ca/page/travel-meal-and-hospitality-expenses-directive-2020>

Transportation

You can use your Passport funding to pay for your transportation costs for the following:

- Local transit, mileage, taxis* to/from:
 - Employment
 - Admissible community participation/respite activities
- Transportation to/from local social engagements and recreational activities in your home community, which may include those with family and friends (**excluding** personal holiday travel, vacations to visit family/friends and family visits related to custody arrangements).

- *The program recognizes that your community may be in a rural, remote or northern location and may require you to travel longer distances.*
- *The program recognizes that your community may include Indigenous communities which are on or off reserve.*
- Reimbursement for airfare to and from admissible Community Participation Supports activities requires **a pre-approval prior to booking travel**. You can contact your local Passport agency to make a pre-approval request for reimbursement of airfare costs.

Some types of transportation expenses are **not allowed** under the Passport program, including:

- Costs associated with personal holiday travel and vacations to visit family/friends, including transportation costs, accommodation (hotels, vacation rentals, campgrounds), and travel/health insurance for the Passport recipient.
- Transportation to and from:
 - Family visits that are related to custody arrangements
 - Medical appointments (doctor, dentist alcohol/drug recovery, mental health therapy / counselling, etc.)
 - Daily living errands (shopping, banking, etc.)
 - Support workers/drivers to get to/from their home/place of employment to the place of providing support (mileage to get to/from the Passport recipient's residence, etc.)

* The Ministry recommends that Passport recipients use the expense limits set out in the Government of Ontario's Travel, Meals and Hospitality Directive for government employees as a guide for support workers' expenses. The Directive may be viewed at:

<https://www.ontario.ca/page/travel-meal-and-hospitality-expenses-directive-2020>

Technology

You can use your Passport funding to pay for technology related goods and services **up to a maximum annual reimbursement amount of \$3,000 per fiscal year**. Examples of technology related goods and services include:

- Laptops and tablets and accessories
- Cell phones, phone or data plans, internet provider fees
- Personal/household electronic items (fit bits, printers, Google Nest, etc.)

- Repairs and maintenance for admissible technology items, including supplies and services, warranties and service plans, etc.

Any **admissible** technology expenses above the maximum annual reimbursement amount of \$3,000 per fiscal year would require pre-approval and must be related to your individual support needs. Technology expenses associated with data/internet plan overages that exceed the maximum allowable reimbursement amount of \$3,000 per fiscal year are excluded from the pre-approval process. You can read more about this in the [Pre-approval Process](#) section of the guidelines.

Inadmissible Technology Expenses

- Gaming related items, including:
 - Gaming consoles
 - Video games
 - Software
 - Hardware
 - Accessories
 - Virtual reality systems
- Gaming apps and gaming related subscription services (Xbox Live, PlayStation Plus, etc.) and in-game/in-app purchases
- Television/cable, streaming and subscription services (Netflix, Disney+, Roku, Spotify, etc.)

You can find more information about inadmissible expenses in the section, [Appendix B: Inadmissible Expenses](#) of these guidelines.

Community Participation Support Supplies and Equipment

You can use your Passport funding to pay for supplies and equipment to support both organized and general social, leisure and cultural activities, such as sports, recreation, fitness, arts and crafts, learning and skills development **up to a maximum annual reimbursement amount of \$2,000 per fiscal year**. Examples of Community Participation Support supplies and equipment include:

- Fitness, recreation and sports equipment
- All types of non-motorized watercraft and related accessories (including personal floatation devices)
- Arts and craft supplies
- Safety equipment such as helmets, shin guards
- Repairs and maintenance for admissible items, including supplies and services (bike tune-up)

- Supplies for courses (excluding food costs)
- PPE consumable supplies such as gloves, masks, gowns, cleaning supplies (disinfectant wipes, sprays, and hand sanitizer) and goggles and face shields (Note: general household cleaning supplies are not admissible).
- Sensory items

Inadmissible Community Participation Support Supplies and Equipment Expenses

- Items that may provide a sensory element but are inadmissible under the Passport program guidelines will continue to be inadmissible, for example: furniture, permanent and semi-permanent structures, and household items.
- Items that can function as a physical restraint.
- Clothing such as the following is not an admissible expense under Passport:
 - Regular, everyday clothing including winter clothing (jacket, hat, gloves, winter boots, etc.).
 - General athletic wear and yoga wear, including swimsuits and gym shoes.
 - Adaptive clothing.

Person-Directed Planning

You can use your Passport funding to purchase supports to develop a person-directed plan that builds on your strengths and interests and identifies the supports you need to achieve your goals **up to a maximum annual reimbursement amount of \$2,500 per fiscal year**.

Person-directed planning services and supports may be purchased from independent planners and facilitators or developmental services agencies.

Administrative Supports

You can use up to **10% of your total Passport funding** for administrative supports (e.g., bookkeeping, payroll, scheduling support workers, bank fees for Passport-dedicated bank accounts).

If you choose to purchase services through a service provider, you and/or your PMF will need to negotiate the total amount of administrative costs that the agency is allowed to invoice on your behalf. This administrative fee cannot exceed 10% of your total Passport funding amount. Service providers that are offering administrative services and invoicing the Passport program on behalf of the Passport recipient are **not** automatically entitled to 10% of the recipient's **total** Passport funding amount.

Inadmissible Expenses

In addition to some exclusions noted above, there are some types of expenses that Passport funding may not be used for. Some categories of inadmissible expenses are listed in the section, [Appendix B: Inadmissible Expenses](#) of these guidelines. This is not an exhaustive list of inadmissible expenses. If you are unsure if an item or service is admissible, your local Passport agency can help you. Claims submitted for expenses that are not allowed under Passport will not be reimbursed.

If you have an exceptional circumstance or unique support needs that you feel necessitate the purchase of supports that are not typically admissible under the Passport program, you can submit a Pre-approval request with an extenuating circumstance. You can read more about this in the [Pre-approval Process](#) section of the guidelines.

There are some types of inadmissible expenses that are specifically excluded from the Pre-approval process. These expenses are always inadmissible and are noted in the table found in [Appendix B: Inadmissible Expenses](#) of these guidelines.

Pre-approval Process

Overview

If you have an exceptional circumstance or unique support needs that you feel necessitate the purchase of supports that are not typically admissible under the Passport program, you can submit a Pre-approval request with an extenuating circumstance. All Pre-approval submissions must be aligned with the intent of the Passport program with an emphasis on the following:

- The **goals and principles** of the Passport program, as described in section [What is the Passport program?](#);
- The **alignment** of the service/item to your specific support needs; and
- The **cost-effectiveness** of the expenditure:
 - Does the cost associated with the purchase of the service/item allow for adequate remaining funds for other key services and supports needed by the person for the remainder of the fiscal year?
 - Is your planned expense the most cost-effective option?

The Pre-approval process is to be used **prior** to the expense being incurred. Should you have already purchased an item, and the decision is made that the cost will not be reimbursed, you are responsible for any costs incurred.

Your Passport agency can assist you if you are unsure about the admissibility of an expenditure or purchase you would like to make, and if the Pre-approval process is an option. To be considered, expenses over the annual maximum for the categories of Technology and Community Participation Support Supplies and Equipment must be tied directly to your support needs.

The Pre-approval process **cannot** be used to request:

- Exceptions to the eligibility restrictions for Persons Managing Funds, Registered Support Workers and Unpaid Primary Caregivers.
- Debt forgiveness.
- Exemption from claim reconciliation requirements.
- Technology expenses associated with data/internet plan overages that exceed the maximum allowable reimbursement amount of \$3,000 per fiscal year.

Please contact your Passport agency if you would like to submit a request for Pre-approval. Your Passport agency will work with you to collect information on your request and determine if it meets the Pre-approval principles. If it does, the request will be reviewed, and a decision provided. Decisions made by the program are final.

Indirect Respite

Indirect respite is inadmissible under the Passport program but may be considered for reimbursement through the Pre-approval process due to the presence of extenuating circumstances.

Indirect respite services and supports are **short-term** arrangements (up to six months) that help your primary caregiver manage household and family responsibilities that are not directly related to caring for you.

Indirect respite is intended to support primary caregivers in situations where extraordinary demands on their time and/or physical, mental, or emotional resources would compromise their well-being or that of the person(s) they are caring for.

A pre-approval for indirect respite services and supports may be extended if the caregiver is unable to make alternate arrangements or obtain the required supports in the initial six-month timeframe. A request for an extension of indirect respite requires the submission of a new pre-approval request.

Factors that are considered in deciding whether indirect respite may be approved due to extenuating circumstances include:

- Changes in support needs or support arrangements (e.g., loss of service and the caregiver must take on the role or work of a support worker/service provider until the needed supports are put in place).
- Competing caregiving demands (e.g., caring for other family member(s) with special needs or aging parents).
- Health and safety of the caregiver (e.g., inability to cope and the caregiver is at risk of burnout; recovery from major illness or medical procedure).
- Health and safety of the person with a developmental disability (e.g., professional house cleaning services are needed due to a medical condition).

Exclusions

There are some types of inadmissible expenses that are specifically excluded from the Pre-approval process. These expenses are always inadmissible and are identified in the table found in [Appendix B: Inadmissible Expenses](#) section of these guidelines.

Appendix A: Descriptions

Recipient

The recipient is the eligible adult with a developmental disability receiving Passport funding. The recipient is responsible for their Passport funding and ensuring that program funding is used per the program guidelines. This responsibility can be shared by designating someone else as a person to manage their Passport funding. This is known as a Person Managing Funds (PMF).

Person Managing Funds (PMF)

The PMF is responsible for helping to make decisions about how Passport funding is used and establishing an annual budget. The PMF is the person who signs the Passport Service Agreement and is responsible for understanding the roles and responsibilities of administering the Passport funding. The PMF is also responsible for registering support worker(s) with the Passport program. The PMF is responsible for ensuring that any Passport expenses are eligible prior to purchase or submitting a claim for reimbursement.

You can be your own PMF or you can designate a trusted friend or family member to be your PMF. In some cases, a representative of the Office of the Public Guardian and Trustee of Ontario may act as your PMF. You can also choose a ministry funded Transfer Payment Recipient (TPR) to be your PMF. Your PMF cannot be a person that provides you with paid supports (e.g., support worker).

Your local Passport agency can help you choose your PMF and complete the required forms.

Unpaid Primary Caregiver

In the Passport program, an unpaid primary caregiver (UPC) is the main person(s) who takes responsibility for helping to support and care for the Passport recipient. The UPC could be living with the recipient or somewhere else. The UPC could be a parent(s), another adult family member(s), or another person(s) with primary responsibility for helping the recipient with their care and wellbeing. Unpaid primary caregivers and their spouses are not allowed to be reimbursed for providing supports.

An unpaid primary caregiver will benefit from the receipt of Caregiver Respite services and supports, which are eligible expenses for reimbursement under Passport.

Registered Support Workers

Registered support workers can be any person 18 years or older, chosen by the recipient and/or their Person Managing Funds (PMF), who may be reimbursed for providing the recipient with a service or support.

To be reimbursed as a support worker under Passport, eligible individuals must be registered by the recipient and/or their PMF.

The following people **cannot** be registered or reimbursed as a support worker under the Passport program:

- Any person under the age of 18, including the recipient's family members under the age of 18;
- The spouse of the Passport recipient, regardless of residence;
- The unpaid primary caregiver(s) of the Passport recipient;
- The spouse(s) of the recipient's primary caregiver(s), regardless of residence;
- The parent(s) and stepparents of the Passport recipient;
- The Person(s) Managing Funds (PMF) for the recipient; and
- An individual or family who is receiving financial compensation from the Ministry of Children, Community and Social Services (MCCSS) to provide:
 - Supportive living arrangements,
 - Supports or care for an adult with a developmental disability through a Ministry-funded transfer payment recipient, the Adult Protective Service Worker program, or the Host Family program.
 - Family members (spouse, adult children, etc.) that live within the Host Family home (making up the family) as part of the Host Family program are **not eligible** to be reimbursed as a support worker under Passport.

Appendix B: Inadmissible Expenses

The following table includes expense categories that Passport funding may not be used for. This is not an exhaustive list of inadmissible expenses. If you are unsure if an item or service is admissible, your local Passport agency can help you. Claims submitted for expenses that are not allowed under Passport will not be reimbursed.

There are some types of inadmissible expenses that are specifically excluded from the pre-approval process. These expenses are always inadmissible and are noted in the table below in the “Pre-approval Exclusion” column.

Inadmissible Expense Category	Pre-approval exclusion
Indirect respite services and supports (e.g., cleaning, meal preparation, snow removal, care of other family members).	
Costs associated with live event tickets above the per ticket cap of \$150	X
Gaming related items, including gaming consoles, video games, software, hardware, and accessories	
Virtual reality systems and related accessories	
Gaming apps and gaming related subscription services (Xbox Live, PlayStation Plus, etc.) and in-game/in-app purchases	
Television/cable/gaming, streaming and subscription services (Netflix, Disney+, Roku, Spotify, etc.)	X
Cancellation fees	X
Behavioural support plans	

Inadmissible Expense Category	Pre-approval exclusion
<p>Fees for therapies/specialized services (e.g., speech and language, physiotherapy, occupational therapies, nursing, massage, Cognitive Behavioural Therapy, Dialectical Behaviour Therapy, and Applied Behaviour Analysis)</p>	
<p>Medical services and devices</p>	<p>X</p>
<p>Dental services and vision care services, etc.</p>	<p>X</p>
<p>Prescription and over the counter medications and medical supplies</p>	<p>X</p>
<p>Assistive devices and specialized equipment (wheelchairs and accessories, lifts, beds, mattresses, etc.)</p>	
<p>Items that can function as a physical restraint</p>	<p>X</p>
<p>Housing, home maintenance and home modifications including permanent and semi-permanent structures</p>	<p>X</p>
<p>Housekeeping, home maintenance and yard work services</p>	
<p>Vehicle purchase and/or modifications, leases, and rentals</p>	<p>X</p>
<p>License fees, dues, tests, permits for, but not limited to, driving, business costs, professional accreditation, and Possession and Acquisition License (PAL).</p>	
<p>Electronic or motorized vehicles, motorized watercraft and other motorized and/or gas-powered items and equipment</p>	
<p>The purchase of gift cards and gift certificates</p>	<p>X</p>
<p>Personal care goods and services (e.g., toiletries, spa treatments, aesthetic and cosmetic services)</p>	

Inadmissible Expense Category	Pre-approval exclusion
Clothing, including regular footwear	
Household items (e.g., furniture, small and large home appliances and household products)	
Groceries	X
Food and restaurant meals for the Passport recipient	X
Accommodation for the Passport recipient, including hotel, overnight camping, rentals, RV lot fees and including when associated with participation in admissible activities	
Personal holiday travel (e.g., vacations to visit family/friends) including transportation costs, accommodation (hotels, vacation rentals, RV lot fees campgrounds), travel/health insurance for the Passport recipient	X
Tuition for post-secondary education/degree programs that are eligible for government student assistance programs such as the Ontario Student Assistance Plan (OSAP)	
Legal services/fees	X
Fees associated with Registered Disability Savings Plan (RDSP) and other financial products, and portfolio management	X
Interest or financing payments associated with the purchase of admissible items or services, debt financing costs and interest associated with credit cards/loans	X
Gambling and gambling activities	X
Cigarettes, tobacco, and vaping products	X

Inadmissible Expense Category	Pre-approval exclusion
Alcohol, cannabis, cannabis products/edibles	X
Controlled substances, products and activities (e.g. involving alcohol, tobacco, cannabis, and related products)	X
Prohibited substances, products or activities	X
Adult entertainment services (virtual or in person), escort services and other adult services	X
Weapons, guns, and other firearms, including BB guns	X

Appendix C: Additional Resources

Person-Directed Planning

For information about how you can use your Passport funding towards person-directed planning, please see *Creating a Good Life in Community: A Guide on Person-Directed Planning*.

The Guide and a plain language version may be viewed at:

<https://individualizedfunding.files.wordpress.com/2014/07/a-guide-on-person-directed-planning-english.pdf>

<https://individualizedfunding.files.wordpress.com/2014/07/plain-language-guide-on-person-directed-planing-english.pdf>

Additional person-directed planning resources are also available online. The Ontario Independent Facilitation Network is a provincial network whose purpose is to inform, educate, encourage, support, link and promote independent facilitation and planning in Ontario. Information and resources to support person-directed planning are available on their website at: www.oifn.ca

Modified Accrual Accounting (MAA)

The Passport program uses Modified Accrual-based Accounting (MAA). MAA rules require that the reimbursement payment be assigned to the budget for the fiscal year when you receive services, or when goods are delivered to you.

This means that you get reimbursed for your claim right away but that the funds are paid out of your budget for the fiscal year when the activity/service occurs, or the goods are delivered. In cases where you purchase something in one fiscal year that is delivered in the next fiscal year, the payment year is not the same as the budget year.

Example 1:

You register and pay for a summer camp and submit your claim in **January 2023** for a camp that will take place in **August 2023**. In this case you will be reimbursed in the fiscal year you submit your claim (the current fiscal year) but the funding will come from your Passport allocation for the fiscal year when you attend the camp (the next fiscal year).

EXAMPLE 1 Payment of Summer Camp Fees in January 2023 Camp Occurs August 2023		
Fiscal Year Claim Submitted & Reimbursed	Fiscal Year Summer Camp Occurs	Fiscal Year Reimbursement is Paid From
2022 - 2023	2023 - 2024	2023-2024

Example 2:

You purchase a tablet online and submit your claim in **March 2023**. The tablet is delivered to you in **April 2023**. In this case you will be reimbursed in the fiscal year you submit your claim (the current fiscal year) but the funding will come from your Passport allocation for the fiscal year when you received the tablet (the next fiscal year). This is because one fiscal year ends on March 31 and the next fiscal year starts on April 1.

EXAMPLE 2 Purchase of Tablet in March 2023 Delivered in April 2023		
Fiscal Year Claim Submitted & Reimbursed	Fiscal Year Tablet is Delivered to You	Fiscal Year Reimbursement is Paid From
2022 - 2023	2023 - 2024	2023-2024

Hiring a support worker & being an Employer

The following is meant to be informational only and is not intended as legal or financial advice. Passport recipients are responsible for understanding and meeting the legal and financial obligations associated with hiring support workers.

Be aware that when hiring a support worker, an employer's obligations and responsibilities will depend on the employment status of the support worker and whether he or she is an employee or a self-employed individual under Canada Revenue Agency rules.

The Canada Revenue Agency provides general information and a number of guides and forms for employers on its website at:

<https://www.canada.ca/en/revenue-agency/services/forms-publications/publications/rc4110/employee-self-employed.html>

Guides to the Ontario Employment Standards Act, 2000 and the Occupational Health and Safety Act can be found on the Ministry of Labour's website at:

<http://www.labour.gov.on.ca/english/es/pubs/guide/index.php>

<http://www.labour.gov.on.ca/english/hs/pubs/ohsa/index.php>

If you choose to employ your support worker directly, your Passport funding may also be used to cover applicable employer costs (e.g., Canada Pension Plan, Employment Insurance and Workers Safety and Insurance Board premiums, vacation pay).

Quality of Services and Supports

Individuals who manage their own funding and supports are responsible for monitoring the quality of the services being purchased. Complaints or concerns about the quality of supports must be taken up with the service provider, not the Passport agency.

While developmental services agencies funded by the Ministry of Children, Community and Social Services are regulated and monitored by the Ministry, other agencies and service providers are not. In some cases, mainstream community agencies or private service providers may be regulated by a different level of government, a professional association or a statutory body. Where independent/individual/private service providers are not, or less, regulated, there may not be specific standards that have to be met and/or an overseeing body that can hear complaints and help resolve problems.

Some types of questions to be asked when selecting a service provider include:

- Does the service provider have the skills to provide the service or support I need?
- What are the costs of the supports?
- Are there any conditions related to the provision of the support?
- What will my responsibilities be?
- Does the service provider have adequate insurance coverage (e.g., in case a support worker is injured while at your home)?
- Does the service provider have references?
- Do they have a complaint process you understand and feel confident about?