



Memorandum

Date: November 14, 1998

To: Directors
Employment and Income Assistance

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Subject: **General Assistance Cases – Automated**

An integral part of the Welfare Reform initiative has been to improve program delivery so that staff can focus more time on helping clients to make the transition to employment and less on day to day case administration. Based on a recommendation by the Service Enhancement Team (SET) **SAMIN** programming has been completed to provide an option for automating payments to General Assistance (GA) clients where the situation merits.

The changes to **SAMIN** will enable GA cases to receive benefits in the same manner as automated single parent and disabled cases. Therefore, at enrollment and periodically in ongoing GA cases, staff must determine the manner in which to make income assistance payments. As the client's circumstances change, the manner in which income assistance is paid may be adjusted to best suit the day to day administration needs specific to the case.

The following information should be taken into consideration to determine the appropriateness of automating a GA case and also the procedures to observe for periodic review.

INCOME ASSISTANCE PAYMENTS TO GA CASES

As per Section 5.4(1) of *The Employment and Income Assistance Act*, an applicant, recipient or dependant has an obligation to satisfy the director that he or she has met employment expectations as set out in the *Regulation* in order to become self-sufficient. In addition, Section 9(1) of the *Regulation* obligates clients to report any changes in their circumstances that may affect the entitlement to, or the amount of, the income assistance they receive.

From the date of enrollment, GA cases are normally expected to report their circumstances before further benefits are provided. If the decision is made to require the client to report staff will continue to enter an indicator into **SAMIN** identifying that an Income Declaration or Attendance and Progress form is to be forwarded to the client on a monthly basis. This will result in the case remaining deactivated and will require staff to review the client's report and to **activate the case on a monthly basis** to provide income assistance.

DECISION TO AUTOMATE GA CASES

GA cases must be reviewed to determine if the case should be required to report regularly or if it should be automated for a specific period of time. The Income Assistance Counsellor's decision to automate a GA case must be documented on the Case Management Record (CMR) or the Case Management Intake Record (CMIR).

All GA cases that have been automated and remain continuously enrolled must be reviewed at least once every three months to ensure the circumstances of the case have not changed. Currently, **SAMIN** does not have a way of producing a BF for staff to identify a GA case that is to be reviewed. A manual BF must be produced to review this decision in a timely manner. It will not always be necessary to make contact with the client or ask the client to report to do this review if, for example, the client's circumstances of the employment availability in the area has not changed. At the discretion of the District Director certain cases may be reviewed less frequently; however, all cases must be reviewed at least on an annual basis.

The following factors, as they impact the client's likelihood to secure employment consistent with their Personal Job Plan, should be considered as each GA case is reviewed to determine if the case should be required to report regularly or to be automated.

1. **Temporary Health Condition**

A review of these factors would include assessment of the client's capabilities and potential, as well as their limitations. If the client has health limitations, they may be referred to appropriate rehabilitation programs or to other agencies, if available.

2. **Age**

The client's age may affect their employment potential.

3. **Education**

A client's education level may need to be considered in identifying achievable employment.

4. **Social Circumstances**

Factors such as family size, ages of children, social or linguistic barriers, dependants with special needs, or willingness to relocate may be a consideration.

5. **Access to or Availability of Supports to Employment**

Resources such as day care or transportation may affect a client's potential to become employed.

6. **Employment Availability in Local Area.**

AUDITING AUTOMATED GA CASES

District Directors must include a review of all Counsellor file recordings of decisions to automate new/re-opened and ongoing GA cases in the course of the District Director file audits and monitoring.

MONITORING THROUGH SYSTEM PRODUCED FORMS

Staff may review GA cases on an "as required" basis using either an Income Declaration

form or a Job Search form. Both forms are available on the Request Form (REFO) transaction in **SAMIN**.

SAMIN will now generate an automated Employment and Income Assistance Review form on the anniversary of the case effective date regardless of whether the case is automated. The Annual Review date will automatically appear on the Change Case (CHCA) screen. GA cases enrolled for less than one year will not receive the automated Employment and Income Assistance Review. Staff may initiate a system produced review form at any time using the Request Form (REFO) function in **SAMIN**.

SAMIN CHANGE TO ENABLE AUTOMATION OF GA CASES

The necessary **SAMIN** changes to enable the automation of GA cases have already been implemented. As a result all GA cases currently enrolled will be automated except those where the following conditions exist in the case.

- The income declaration indicator on the Client Employment (CCEM) screen is turned on. The case will not be activated and the Deactivated Status Reason Code will be set to **“MID – Missing Income Declaration.”**
- The attendance and progress indicator on the Client Education/Training (CCET) screen is turned on for the AP (applicant), SP (spouse), or CL (common-law) **only**. The case will not be activated and the Deactivated Status Reason Code will be set to **“AP – Attendance and Progress.”**
- Non-treaties on Reserve will not be automated if there is only 1 line of disbursement on the IBDI screen and the need code is MOBE with a disbursement method of DBDO or DBCA. The Deactivated Status Code will be set to **“WFB – Waiting for Billing”**.

REPORT IDENTIFYING AUTOMATED GA CASES

Effective immediately, all GA cases currently enrolled must be individually reviewed by December 21, 1998 to determine which cases are appropriate to be automated for the January 1999 benefit month. To assist staff in identifying GA cases that will be automated, a one-time report “Generate GA Automated Cases (GGAA) will be produced approximately December 16, 1998. This report identifies cases by counselor that will be automated. Counsellors must review this report to ensure that the appropriate cases are automated.