Act/Regulations Reg. 4, 5, 22	Section	Social Programs	7
	Program	Social Assistance	13
	Instructions	NEW APPLICATIONS	2-2
Effective: February 1, 1995 Revised: November 1, 2007		Authorized by: Director of Social Assistance	Page: 1 of 2

NEW APPLICATIONS:

1. Before beginning to fill in application forms for assistance or services under the Social Assistance Act, the worker shall explain the documents, reasons for completion, and authority for obtaining.

   Before obtaining signatures, the client declaration form must be reviewed with the client to ensure the client understands the importance of accurate information and reporting of any future changes in circumstances.

2. The Worker shall:

   - Clarify if Social Assistance to be utilized;

   If, Social Assistance is to be utilized, complete:

   - Financial Assistance Assessment (ISM Assessment Tab);
   - FA Case Plan (ISM Assessment Tab);
   - Client Declaration (ISM Assessment Tab);
   - Documentation to adequately describe/verify the reason for any decision made in relation to eligibility or the calculation of a specific award.

3. In addition, it is necessary to verify certain information about income, assets, and expenses. The onus should be placed on the client to provide required documentation in support of income or expense claims. If a worker elects to assume the responsibility for verification, the following forms are to be used as appropriate:

   (1) Verification of Assets, Income or Mortgages (ISM documents); and/or

   (2) Authority for Release of Confidential Information (ISM documents).

   These forms are to be used to obtain specific information at any time the information is required, and stored in the file.

4. A worker is then assigned to the case and the appropriate worker is entered in ISM. A review date is entered to ensure that a home visit is made in all but emergency situations.

5. In completing the form, the worker shall ensure that the information is provided by the applicant and that there be no "coaching". The worker may assist the client in estimating expenses for variable items but the final figure shall be that of the client.

6. In completing the section of the Financial Assistance Assessment form relating to employment income, the worker shall explain the policy of the Department regarding exemptions as it applies to the applicant. The client's obligation to advise the Department of his/her earnings or other income should be explained at this point.

7. The Client Declaration and the Financial Assistance Assessment forms require signatures of both spouses, except when extenuating circumstances prevent the obtaining of the second signature. Such circumstances shall be approved by the designated supervisor.

8. If the assistance is approved, the client shall be advised in writing of the amount of the assistance to be paid, the method of payment, the likely duration of the benefit period, and the applicant’s right to appeal. If assistance is not approved, the applicant shall be informed in writing with reasons for the decision and the applicant’s right to appeal. The worker shall forward an appropriate form letter to the applicant. All persons applying for assistance, whether their claims are approved or rejected, should be told of his/her right to appeal.

CROSS REFERENCE:

2-1 Application for Assistance - General
2-3 Re-Application/Reviews
2-4 Home Visits
3-11 Medical Assessments - Disabled Applicants