

	Program	Social Assistance	
	Subject	Case Plans	Policy # 2.2
Effective Date: July 1, 2022		Authorized by: Deputy Minister Jamie MacDonald	

1.0 PURPOSE

- 1.1 To identify an applicant's participation in an individualized case plan as a condition of eligibility for Social Assistance (SA) and to identify specific circumstances where a case plan is not required.

2.0 DEFINITIONS

- 2.1 **Applicant:** a person who applies for or on whose behalf an application is made for SA.
- 2.2 **Case Plan:** a written account of an intended course of action to identify supports that may assist in meeting one or more of an applicant's unmet needs, including basic needs. The case plan is a collaboration between the Applicant and the Supports Coordinator and explains in detail what needs to be done, when, how, and by whom.
- 2.3 **Co-Applicant:** the spouse of an applicant, and includes a person who, although not married to the applicant, lives with the applicant as if they were married.
- 2.4 **Emergency Assistance:** financial assistance granted to an applicant on a one-time basis for a period of time not exceeding one month.
- 2.5 **One-Time Special Needs:** financial assistance granted to an applicant on a one-time basis for the cost of funerals, fuel, equipment, hearing aids, medical transportation, or other costs the Department determines as necessary for the health, safety, or well-being of an applicant.
- 2.6 **Support Needs Assessment (SNA):** systematic process for determining an applicant's eligibility for SA and potential support needs.
- 2.7 **Supports Coordinator:** a staff member that provides direction and case management support in delivering a range of social benefits and services to applicants eligible for Social Programs.
- 2.8 **Transient Person:** a person who is present in the province and whose apparent intent is to visit temporarily in the province.

3.0 POLICY STATEMENTS

- 3.1 For the purposes of this policy use of the word applicant is inclusive of co-applicant.
- 3.2 An applicant is required to participate in the development and execution of a case plan as a condition of eligibility for SA.
- 3.3 A case plan will be developed in collaboration with an applicant to address unmet needs, outline specific expectations, to support applicants to attach to the workforce, and to increase an applicant's self-sufficiency.
- 3.4 A case plan is not required as a condition of eligibility for SA where an applicant:
 - is requesting emergency assistance;
 - is requesting one-time special needs assistance;
 - is assessed as a transient person; or
 - is 65 years of age or older and resides in a community care facility.

4.0 PROCEDURE STATEMENTS

- 4.1 Supports Coordinators are responsible to engage an applicant in the development of a case plan through establishing a trusting relationship with the applicant, setting parameters for the case management process, ensuring the applicant understands the terms and conditions of receiving financial assistance, and acknowledging the finite nature of the case management relationship.
- 4.2 Supports Coordinators are responsible to develop a case plan with a trauma informed care approach, as the impacts of trauma influence how people engage with, manage, and exit services. Incorporating respect, compassion, and collaboration into social supports case plans is necessary.
- 4.3 Information collected about the applicant and their situation through the SNA should be used by the Supports Coordinator to analyze and accurately understand an applicant's situation and to set realistic and obtainable goals for resolving an applicant's eligible unmet need(s).
- 4.4 Supports Coordinators are responsible to collaborate with an applicant to develop a social supports case plan identifying the applicant's goals and the action plan required to achieve them. A case plan should prioritize goals and document the roles, responsibilities, and timing for action items, including specific target dates.
- 4.5 Case plans will be tailored to meet the applicant's individual needs and the Supports Coordinator will determine and advise the applicant of the reporting expectations based on the applicant's individual circumstances. Case plan actions may include but are not limited to:
 - personal development services to facilitate progressions to self-sufficiency;
 - referrals to appropriate agencies that address an applicant's needs and goals;
 - employment related supports.

- 4.6 A case plan is an ongoing process between a Supports Coordinator and an applicant. The Supports Coordinator is responsible to monitor and/or adjust the case plan as the applicant's situation changes and/or goals are met. Supports Coordinators are responsible to discuss the applicant's progress toward achieving their goals with the applicant.
- 4.7 Where the applicant chooses not to comply with the case plan or the reporting expectations, the Supports Coordinator will initiate remedial actions.

Remedial Actions

- 4.8 Where an applicant fails to comply with the case plan, the Support Coordinator will schedule an engagement session to review the case plan with the applicant. The purpose of this session is to discuss any difficulties with the tasks identified in the case plan or the reporting process and if necessary, to adjust the applicant's case plan.

Where an engagement session is initiated by the applicant, the discussion would not be considered a remedial measure.

- 4.9 Where an applicant fails to comply with the case plan for a second time, the Supports Coordinator will schedule a second engagement session with the applicant. The purpose of this session is to discuss any further difficulties with the tasks identified in the case plan or the reporting process and if necessary, to further adjust the applicant's case plan.

At this stage, the Supports Coordinator is responsible to discuss the potential consequences of further non-compliance with the case plan and to document that the applicant has been advised that the next remedial action may include closure of financial assistance.

- 4.10 Where an applicant fails to comply with the case plan for a third time, the Supports Coordinator will schedule a third engagement session with the applicant to discuss the applicant's progress. Where the applicant can offer no just cause for not complying with the case plan, the Supports Coordinator will determine if financial assistance should be closed or suspended.
- 4.11 Where an applicant's financial assistance is closed or suspended, an applicant's case plan will be closed.

5.0 REFERENCES

- 5.1 SA Policy 1.5 Transient Persons
- 5.2 SA Policy 1.6 Emergency Assistance