

General Application Script

June 1, 2010

Initial Contact Steps

1. Determine purpose of applicant contact
2. Describe general application process
3. Determine reason for application
4. Discuss other possible resources
5. Estimate eligibility
6. Confirm intent to proceed
7. Consent
8. Open PA file

| Step | Rationale | Suggested Script |
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| 1. Determine purpose of applicant contact | Greet and determine purpose of applicant contact. | <p><i>Hello, how may I help you? (Ask questions to determine purpose of applicant contact).</i></p> <p>If returning a call – determine that it is a good time to have the conversation, provide the citizen with the option of calling back.</p> <p><u>If applying for assistance:</u> <i>Before we begin the process of applying for assistance, we will review some basic information.</i></p> <p><u>If for other reasons:</u> <i>(example) I'm sorry; I believe you should be speaking to the Ministry of ABC. Their phone number/address is 1234.</i></p> |
| 2. Describe General Application Process | Explain steps in General Application Process | <i>In this process, I will first ask you for a brief description of your situation. Next we will discuss options that may be available to you other than applying for income assistance. If at that point you are sure you would like to apply for assistance, we will discuss next steps.</i> |

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| 3. Determine reason for application | <p>Obtain a brief description of the applicant's situation.</p> <p>Note: The intention is not to begin an in-depth discussion, but to obtain some basic information so that you can help the applicant determine if there are other resources available.</p> | <p><i>Please provide a brief overview of your situation.</i></p> |
| 4. Discuss other possible resources | <p>Based on the applicant's situation, discuss alternate resources that may better meet their need.</p> <p><u>If recently working:</u></p> <ul style="list-style-type: none"> • EI <p><u>If on EI in past 3 years or maternity leave in last 5 years:</u></p> <ul style="list-style-type: none"> • HRSDC funding <p><u>If over age 65:</u></p> <ul style="list-style-type: none"> • CPP • OAS <p><u>If age 60-64:</u></p> <ul style="list-style-type: none"> • Early CPP <p><u>If applicant has a disability:</u></p> <ul style="list-style-type: none"> • CPP Disability <p><u>If full time adult student:</u></p> <ul style="list-style-type: none"> • Student Financial Assistance <p><u>If a very temporary solution is required:</u></p> <ul style="list-style-type: none"> • Review regional intranet site or resource list <p>If 19 – 24 years old and a former youth in care</p> | <p><u>Example: if applicant indicates they have been on EI in last 3 years or maternity leave in last five years:</u></p> <p><i>Based on the information that you have given me, you may be eligible for further funding and assistance from Human Resources and Skills Development Canada for:</i></p> <ul style="list-style-type: none"> • <u>Skills Training</u> – Provides financial assistance to help pay for the cost of skills training and related expenses while enrolled in an approved training program. • <u>Self-Employment Support</u> – Provides financial support and assistance while getting a business started. • <u>Wage Subsidy</u> – Reimburses an employer for part of the cost of your wages. • <u>Job Creation</u> – Provides financial support while working on a project that benefits the community and maintains your skills. <p><i>I have information on the closest HRSDC office in your neighbourhood. You can contact them to find out if you are eligible and what your options are. (Provide contact information such as http://www.hrsdc.gc.ca).</i></p> <p>Agreements with Young Adults (AYA) link to MCFD News Release.</p> |

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| | Remind citizens that by filing their income tax they will be assessed for tax credits such as GST, BC tax credit, Family Bonus and the Carbon tax credit. | <i>I would also like to take this opportunity to remind you of several tax credits that may be available to you by filing your income tax. If you need more information on those credits or how to file your taxes I can provide you with the number for Revenue Canada.</i> |
| 5. Referral to Online Estimator / Orientation | <p>Explain the purpose of the Income Assistance Estimator, refer to the estimator and assist if necessary</p> <ul style="list-style-type: none"> • Add a question as to whether they are a student (IA Estimator does not address this) • Access the estimator here: http://www.iaestimator.gov.bc.ca/ | <p><i>The <u>Income Assistance Estimator</u> is a tool to assess the possible outcome of an application for assistance.</i></p> <p><u>Once Estimator is completed:</u></p> <p>Whether the applicant is estimated to be eligible or not eligible:</p> <p><i>Based on the information you have provided, the amount assessed is only an estimate from this tool.</i></p> <p><i>You have the right to continue with the application process.</i></p> |
| 6. Confirm intent to proceed | Determine whether the applicant would like to proceed or exit the application process. If yes, then begin Stage 1 of the application process. | <p><u>If applicant defers:</u> If your situation changes, you may apply again. Exit the process</p> <p><u>If applicant intends to proceed:</u> <i>Based on our conversation, you are advising me that there are no other immediate resources available to you. Would you like to begin the application process?</i></p> |
| 7. Consent | F2F – The new HSD0080A contains all the information and consents that are required to collect, retain and verify information. Explain this fully to the | <i><u>This document is the Application for Assistance – Part 1. By signing this document, you are giving consent for us to collect, retain and verify your information, including 3rd party checks. If you are giving your consent, please sign here.</u></i> |

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| | <p>client prior to collecting any of their information and have them sign.</p> <p>Remote – Review the HSD0080A completely with the client, and ask for verbal consent. Ensure the client understands that their verbal consent gives us permission to gather, retain and verify their information. Advise the client that once the consent is signed (within 5 business days), all other services are available via telephone or in person (depending on your local service options).</p> <p>Resource: Application for Income Assistance (Part 1) Overview document.</p> <p>F2F - Once the consent is signed advise client that further services are available in person or by telephone.</p> | <p><i>Remote: I have read you the document and explained it; do you understand it? By giving your verbal consent you are giving the Ministry permission to gather, retain and verify your information. Do you give your verbal consent for 5 business days to allow us to begin work on your file? You will need to come in (or attend a Service BC office) within that 5 days to sign the actual document.</i></p> <p><i>CRA: This is a separate consent for Revenue Canada, it allows us to go back one year from the date of your signature and view what you have filed on your income tax.</i></p> <p>NOTE: CRA checks are not to be done with a verbal consent. Complete when HSD0080A is signed by client</p> |
| <p>8. Open PA file</p> | <p>Set up PA by asking for applicant's name, birth date, address, and ask if the applicant has an outstanding arrest warrant under the <i>Immigration and Refugee Protection Act (Canada)</i> or for any offence that may be prosecuted by indictment.</p> <p>CTS/MIS:</p> | <p>Proactive Questions: <i>Do you have any barriers or disabilities that need to be considered while we process your application?</i></p> <p><i>Refer as required (advocate, interpreter, face-to-face option)</i></p> <p><i>Your legal name please?</i></p> <p><i>Your date of birth please?</i></p> <p><i>Your address please?</i></p> |

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| | <p>PAN, PAC, PA1, PA2, PAR</p> <p>Discuss service options with client (remote or face-to-face).</p> | <p><i>Do you have (or Are you aware of) any outstanding warrant for your arrest under the Immigration and Refugee Protection Act (Canada) or for any offence that may be prosecuted by indictment?</i></p> <p><i>You have the option to reach us by phone or in person for any future services.</i></p> |