

## Stage Two: Eligibility Interview (Intake) Script

July 20, 2011

### Stage Two Process

1. Confirm Three-Week Work Search is complete
2. Prepare for interview
3. Confirm responsibilities are complete
4. Review AP 1-5 for changes, print application and open GA file
5. Review eligibility
6. Determine possible next steps
7. Decide applicant's eligibility and inform of decision
8. Create Employment Plan
9. Administrative Fairness

Process	Rationale	Suggested Script
<p>1. Confirm three-week work search is satisfactory (unless exemptions apply)</p>	<p>Review PA HST and use <u>Three-Week Work Search Review (SD3116)</u> to determine that a reasonable work search has been completed.</p> <p>If satisfactory, continue with process.</p> <p>If unsatisfactory, advise applicant of steps required to complete a reasonable work search.</p> <p><b>Note:</b> Ensure there are no unknown circumstances that could have prevented the applicant from completing the work search.</p> <p><b>ICM/MIS:</b> Comment relevant details on the PA file.</p> <p><b><u>Reconsideration Script</u></b> <b><u>Reconsideration and Appeals Brochure</u></b></p>	<p><i>First, unless you were exempt from searching for work, we need to review the results of your three-week work search.</i></p> <p>(Discuss results based on PA HST comments and Three-Week Work Search Review).</p> <p><i>Is there anything that affected your ability to complete the work search?</i></p> <p><u>If work search is unsatisfactory:</u> <i>To date, it appears you still have not completed all the required work search activities. (Determine what action must be taken to satisfy work search requirements). Offer the decision in writing and advise of the right to reconsideration).</i></p>

Process	Rationale	Suggested Script
2. Prepare for interview	<p><b>ICM/MIS:</b> Review prior PA and GA (if applicable) HST comments.</p> <p>Review physical file (if any).</p>	
3. Confirm responsibilities are complete	<p>It should be confirmed through discussion with the client that the information contained in the Orientation has been reviewed and understood.</p> <p>If applicant was required to access other income, request update on progress. Review PA HST to determine.</p> <p><b>ICM/MIS:</b> Check HST comments for potential other income sources identified to date.</p>	<p><i>Have you had an orientation? If not, we need to discuss the orientation now.</i></p> <p><u>If required to access other income:</u> <i>You have been requested to access (other income source). Please provide an update on your progress with accessing (the other income) and provide any supporting documentation which you may have.</i></p>
4. Review AP1-5 and Open GA file	<p>Quickly review AP1-5 for changes since Stage 1, make changes, print application and open GA file.</p> <ul style="list-style-type: none"> <li>• Complete Aboriginal Self Identifier Form and record on MIS</li> <li>• <b>MIS:</b> Make electronic referral via FMR A screen.</li> </ul>	<p><i>Have there been any changes in your circumstances since your last visit? Rent? Income? Dependents? Outstanding warrant for your arrest? ETC.</i></p>
5. Review eligibility	<p>Discuss with client their eligibility based on information provided at Stage 1 and the third party checks.</p> <p><u>Information</u> <a href="http://www.fcac-acfc.gc.ca/eng/publications/LowCostAccounts/LowCostAccounts_TOC_e.asp">http://www.fcac-acfc.gc.ca/eng/publications/LowCostAccounts/LowCostAccounts_TOC_e.asp</a></p> <p>Did the client submit a completed Family Maintenance Questionnaire (SD3033) regarding Family Maintenance? Is there a “yes” response to any of the nine questions on this form?</p>	<p>(Review application with client and have client sign - record any changes in circumstances on file.</p> <p>In the case of remote service delivery, give instructions to client about how they can sign their application.</p> <p><u>If “yes” response to any question on the Family Maintenance Questionnaire (SD3033):</u></p> <p><i>When a client or spouse of a client is entitled to receive child or spousal maintenance he/she must assign</i></p>

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	<p>If yes, the Assignment of Maintenance Rights (SD2748) must be signed.</p> <p>If no, then the Assignment of Maintenance Rights (SD2748) is NOT required.</p>	<p><i>his/her maintenance rights to the government as a requirement of eligibility for assistance.</i></p> <p><i>I will make a referral for you to a Family Maintenance Worker (FMW) to discuss your situation regarding maintenance. No specific maintenance action will be taken until you have met with the FMW. The FMW will contact you to schedule an appointment within 5 business days from the date that you first receive assistance.</i></p>
<p>6. Determine possible next steps</p>	<p>Determine whether any further documentation required from applicant.</p> <p>Is the completed Family Maintenance Questionnaire (SD 3033) form returned?</p> <p><u>Provide due date for any additional documentation requested.</u></p> <p><u>Note: Provide Information Package #2</u></p> <p><u>If situation on outstanding warrants changed from N to Y, advise applicant that a third party check will be required.</u></p>	<p><u>If further documentation required:</u> <i>We require further documentation to verify your situation. (Check off required documents on the <u>Information/Documentation Checklist SD3034</u>).</i></p> <p><i>Please submit these documents by _____. If you have not submitted the documents by that date, please contact us to advise of your delay; Incomplete documentation will possibly delay eligibility decisions.</i></p> <p><i>We require further verification on your situation before determining eligibility.</i></p>
<p>7. Decide applicant's eligibility and inform of decision</p>	<p>Determine financial eligibility and inform applicant of decision as per service standards.</p> <p><b>Note: if applicant is applying for PWD, financial eligibility is based on whether they will likely be eligible within 6 months.</b></p> <p>Review monthly reporting requirements and provide client with brochure.</p>	<p><u>If eligible:</u></p> <p><i>You meet the Employment and Assistance eligibility requirements. I will now advise you of your eligibility, including the assistance rates and medical coverage. I will also inform you of your reporting obligations, and of the right to reconsideration and appeal should you disagree with a ministry decision. (Provide details of these items along with any other</i></p>

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	<p><b>Note:</b> Inform client that failure to report accurately and completely may result in sanctions.</p> <p><b>ICM/MIS:</b> Record relevant details on GA HST.</p> <p>Review responses on the Family Maintenance Questionnaire (SD3033) form to determine if client or spouse of client is required to assign their maintenance rights to the government. A “yes” response to any of the nine questions, from either party, indicates the Assignment of Maintenance Rights (SD2748) must be signed prior to issuing assistance.</p> <ul style="list-style-type: none"> <li>Complete <u>Assignment of Maintenance Rights</u> and have applicant sign</li> </ul> <p><b>MIS:</b> In FIM U screen, enter Y in assignment signed field. <i>(The FMW is not able to open the Family Maintenance Referral if a “Y” is not entered on the FIM screen)</i></p> <p><u>Existence of outstanding warrants</u></p>	<p>supports or service details that are appropriate).</p> <p>(When the client is eligible for assistance and is required to assign their maintenance rights to the government)  <i>No specific maintenance action will happen until the Family Maintenance Worker (FMW) has met with you and assessed your situation. Within the next five business days you will be contacted for an FM assessment. During this assessment the FMW will review your maintenance situation to ensure that your maintenance rights are upheld. I am now going to ask you if there are any safety issues between you and the other party. I will indicate your response regarding safety issues on the Family Maintenance Referral that I am making to the FMW. This will be reviewed with you by the FMW during your assessment for maintenance action. It is important that you keep all FM telephone and office appointments or your ongoing eligibility for assistance may be affected.</i></p> <p><u>If ineligible:</u></p> <p><i>You do not meet the eligibility requirements for Employment and Assistance. (Provide reason and offer decision in writing.) You have the right to request a reconsideration of this decision.</i></p> <p><b>Note:</b> same script as above for denial of assistance.</p> <p><u>For singles with outstanding warrant(s) or couples where both</u></p>

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	<p><u>confirmed by PSSG:</u> Applicants with outstanding arrest warrants are not eligible for income assistance, disability assistance, or supplementary assistance. However, warrant holders, and family units with warrant holders may be eligible for repayable warrant supplements due to hardship and/or repayable warrant transportation supplement.</p>	<p><u>adults have outstanding warrant(s):</u> <i>Although you have been denied eligibility for income or disability assistance, you may apply for repayable warrant supplements.</i></p> <p>If remote, advise of need to come in to sign SD0080 or follow Service BC process.</p>
<p>8. Create Employment Plan</p>	<p><b><u>MIS:</u> Create initial Employment Plan or Voluntary Plan.</b></p> <p><b>It is expected that all clients (except those returning PWD clients, will be referred to BCEP). Staff will signal to the contractor (process under development) that an assessment of barriers is required, not immediate job placement without support. These clients will be returned to the ministry with some idea of the next best steps for the client.</b></p> <p><b>Discuss service options with client (remote or face-to-face).</b></p>	<p><i>A condition of your eligibility for assistance is that you must be actively engaged in activities that will lead to employment as quickly as possible.</i></p> <p><i>In order to assist you we are required to develop an Employment Plan and possibly refer you to a service provider. (Create plan.)</i></p> <p><i>You have the option to reach us by phone or in person for any future services.</i></p>
<p>9. Administrative Fairness</p>	<p>Give applicant <u>Reconsideration and Appeals brochure</u> at the time the Application is signed.</p>	