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GENERAL

- 1) The “Financial Assistance Assessment” form (ISM Assessment) serves several purposes:
 - (1) Documentation - As the basic source document, the completed application form contains information necessary to the process of:
 - (a) Establishing eligibility
 - (b) Approval of benefits
 - (c) Interpreting decisions to clients with respect to request for assistance
 - (d) Supervisory consultation
 - (e) Monitoring worker decisions
 - (f) Auditing
 - (g) Prosecution;
 - (2) Checklist - To remind field staff of the required areas in relation to an application request (e.g., assets, variety of income possibilities, specific expenses, etc.)
 - (3) Assessments - to facilitate consideration and discussion of:
 - (a) Other related client needs (e.g., employment problems, inadequate housing, unmanageable debt, etc);
 - (b) Client strength that may be mobilized in problem solving;
 - (4) Review - To assist field staff and client in comparison of new circumstances to those at time of application;

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- (5) The correct and accurate completion of the application form is most important, not only for administration and control of the program, but also to safeguard the client rights, ensure “due process” on the client’s behalf and to help address other concerns.
- 2) The application procedure is generally considered to be the most intimidating feature of the Social Assistance Program. The manner in which field staff conduct themselves and how the need for the information is explained to the applicant can minimize the intimidation. Some clients may receive many thousands of dollars in public funds over a life-time as a result of the provisions of the Social Assistance Act, and it is necessary that all payments authorized by staff be fully in accordance with the provisions of the Social Assistance Act and Regulations. The Minister can only be assured on that point if the information provided by clients is complete and accurate in every case.
- 3) (a) Prior to the beginning of the application process, the worker should highlight for the client what the process involves: that a detailed review of the income/expenses is completed; that verification of information is required; and that, once the application forms are completed and signed by the applicant, the information is kept on file. The applicant should be aware of the nature/purpose of the interview so as to anticipate what will be expected during the course of the process.
- (b) Information obtained by the Department while providing services is confidential and may be shared only with other government departments, private agencies, or other persons when necessary and as set out in section 6 of the Social Assistance Act. It is our legal obligation to protect information, and set standards for the appropriate collection, use and disclosure of information as set out in Section 31 (c) of the Freedom of Information and Protection of Privacy Act (FOIPP) of Prince Edward Island.
- 4) Regulation 5(1) requires that an inquiry be made into the living conditions and financial resources of the applicant and his/her family. It is our assumption that most people tell the truth and describe their needs accurately. However, certain information does require verification. Therefore, workers must maintain a positive attitude and explain to the client that such information is required by Regulation and is no reflection on his/her own statements.

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5. If staff members are doubtful about the accuracy of any statement or information given, the worker should review with the applicants the information recorded on the form before obtaining signatures. The worker shall request that the applicant verify that the information provided is accurate and complete. This will be accomplished by the applicant providing records of income and expenses or by he/she giving written consent to the worker to confirm on his/her own.

CROSS REFERENCE

- 2-2 New Application
- 2-3 Re-application/Reviews
- 2-4 Home Visits
- 3-11 Medical Assessments - Applicants Claiming a Disability