

<b>Act/Regulations Reg. 4.4(5)</b>	<b>Program</b>	<b>Social Assistance</b>	
	<b>Subject</b>	<b>Interoffice File Transfers</b>	<b>Policy # 7-7</b>
<b>Effective Date: June 25, 1996</b>		<b>Authorized by:</b>	
<b>Revised Date: July 4, 2013</b>		<b>Deputy Minister, Carol Anne Duffy</b>	

## 1.0 PURPOSE

- 1.1 To facilitate efficient and effective case planning of interoffice file transfers for applicants relocating while receiving social assistance benefits.

## 2.0 DEFINITIONS

- 2.1 **Applicant:** a person who applies for social assistance or a person who receives social assistance.
- 2.2 **Case Plan:** a written account of an intended course of action aimed at achieving specific goal(s) or objective(s) within a specific time-frame. It explains in detail what needs to be done, when, how, and by whom.

## 3.0 POLICY STATEMENT

- 3.1 An applicant planning relocation must advise the Department of their intent to relocate. The department will assess the impact of relocation on eligibility for social assistance.
- 3.2 Applicants have the choice of where they will reside. Eligibility for benefits is determined by the Social Assistance Act, regulations and policy.
- 3.3 If the proposed relocation does not meet eligibility criteria contained within the social assistance program, it will not be supported by the department.
- 3.4 The applicant will be advised by the referring office if the file has been approved for transfer and the process for the file transfer will be initiated.

## **4.0 PROCEDURE STATEMENT**

### **Referring Office Responsibilities**

- 4.1
- (1) The Social Assistance case worker prepares a social assistance Case Plan, Transfer Summary and Transfer Checklist summarizing the applicant's proposed plan.
  - (2) The Social Assistance case worker will "end date" adjudication and "preferred worker" for three (3) months after the transfer date.
  - (3) The Administrative Officer reviews the file and ensures the file is accurate before sending to the receiving office. Files where exceptions to policy have been authorized will need consultation with the receiving office prior to transfer to ensure a clear understanding of the authorization.
  - (4) The Administrative Officer will contact the receiving office by work item to advise of the case transfer, and consult, if necessary.

### **Receiving Office Responsibilities**

- 4.2
- (1) The Administrative Officer in the receiving office will review the file for accuracy.
  - (2) The receiving office will contact the referring office if there are any discrepancies that need to be addressed.
  - (3) The receiving Social Assistance case worker will accept the file and contact the client to confirm the service has been transferred and determine an appropriate extension date.

## **5.0 REFERENCES**

Policy 3-1 Eligibility - General  
Policy 5-11 Shelter Allowances

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### **HISTORY:**

July 4, 2013 - Name of policy changed; procedure and format changes