

# **Social Assistance Modernization: Centralized and Automated Intake**



**THE DISTRICT OF THUNDER BAY  
SOCIAL SERVICES ADMINISTRATION BOARD**

**Presentation to the Board**

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# Long Term Vision

## Social Assistance: Where We're Headed

	Where We've Been	The Current Focus The Recovery Period (Sep 2020 – April 2021)	What's Next? The Renewal Period (Spring 2021 – 2024)
<b>Supporting clients toward success</b>	 <p><b>Caseworkers manage all aspects of each case</b></p> <ul style="list-style-type: none"> <li>Financial eligibility</li> <li>Participation agreements</li> <li>Benefits administration</li> <li>Employment services</li> <li>Referrals and system navigation</li> </ul>	 <p><b>Prototyping new case management approaches</b></p> <ul style="list-style-type: none"> <li>Common assessment   New action plans</li> <li>Shared case management with Employment Ontario</li> <li>Increased access to employment supports</li> <li>Piloting new service delivery approaches</li> </ul>	 <p><b>A person-centred, supportive client approach across the life course</b></p> <ul style="list-style-type: none"> <li>Overall shift to life stabilization, individualized support and system navigation</li> <li>Case segmentation – high and low touch approaches based on client needs</li> <li>Better connections with Employment Ontario</li> </ul>
<b>Making systems faster, fairer, more accountable, and creating time for case management</b>	 <p><b>Modernization to speed current processes</b></p> <ul style="list-style-type: none"> <li>EDM</li> <li>MyBenefits</li> <li>RPC</li> <li>Contact Centre Pilots</li> </ul>	 <p><b>Creating centralized functions</b></p> <ul style="list-style-type: none"> <li>Centralized intake process that reduces paperwork, giving caseworkers more time to support clients through crisis and help them get back to work</li> <li>Automated, risk-based eligibility verification</li> </ul> <p><b>With enabling technology and policy</b></p> <ul style="list-style-type: none"> <li>New digital tools and service modernization (easy-to-use online application, expansion of MyBenefits digital platform, 2-way digital messaging between clients and caseworkers)</li> </ul>	 <p><b>Centralizing financial assistance*</b></p> <ul style="list-style-type: none"> <li>Central teams and systems administer intake, ongoing eligibility, mandatory benefits, financial disbursement</li> <li>Expanding risk-based approaches</li> </ul> <p><i>*Benefits and incentives to support clients achieve life stabilization goals will remain at the local level</i></p>
<b>Working with partners</b>	 <p><b>Working with partners to address challenges of the pandemic</b></p> <ul style="list-style-type: none"> <li>Co-design and deliver emergency response initiatives</li> <li>Leverage learning to inform opportunities for the future</li> </ul>	 <p><b>Planning for renewed provincial-municipal and First Nations service delivery approaches</b></p> <ul style="list-style-type: none"> <li>Renewed provincial-municipal operating, funding and accountability models</li> <li>Plan with First Nations partners a unique approach to SA Recovery and Renewal</li> </ul>	 <p><b>Implementing a renewed service delivery vision</b></p> <ul style="list-style-type: none"> <li>Co-designing, enabling and implementing new approaches that bring us closer to Human Services Integration</li> </ul>



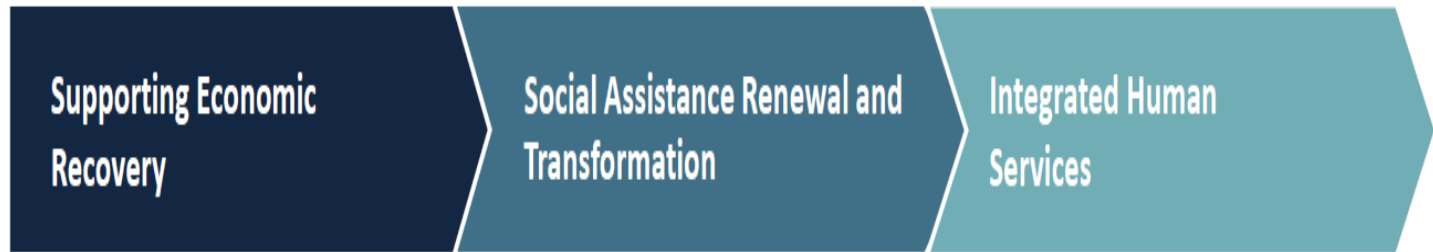
- Engagement, co-design, and testing with staff and partners, including the bargaining agent: Developing a future state together
- SA One: Healthy, energizing workplaces; open communication that supports change; resilient organization; improved client relationships
- Service continuity: Continuing to deliver service excellence and accountability through change





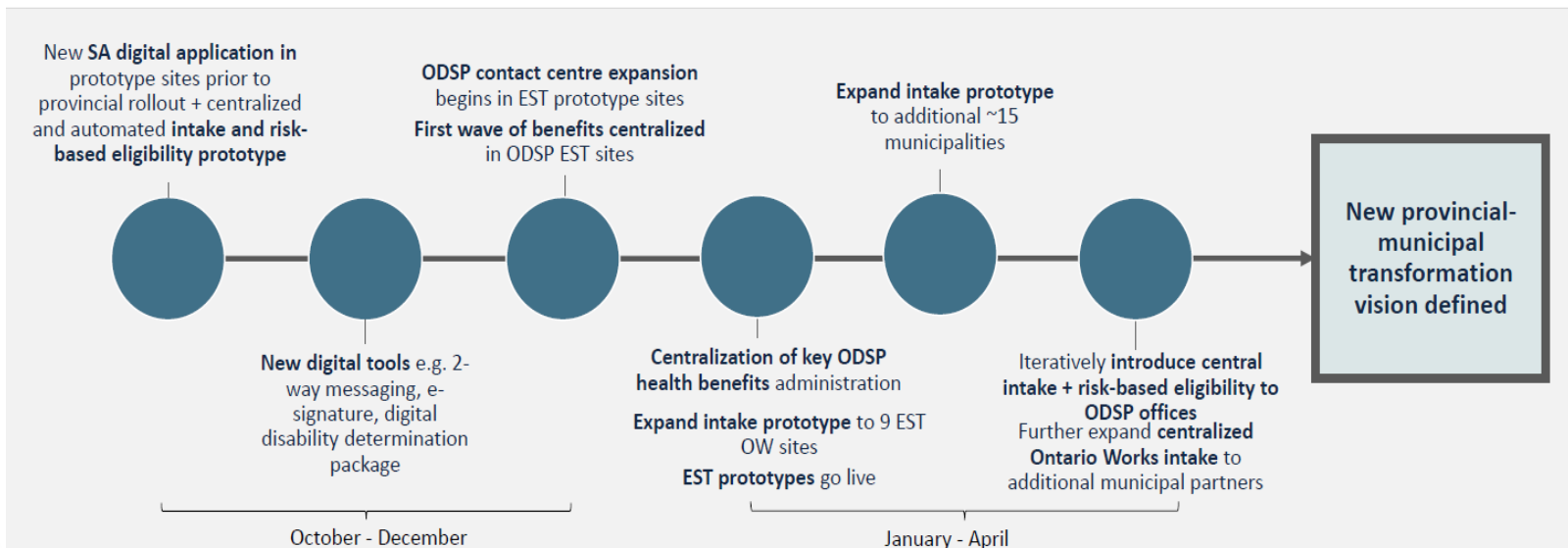
# Long Term Focus

... in the long term



# Short Term Focus

## ... in the short term



# Centralized Functions

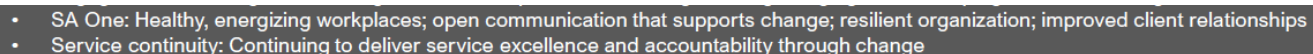
## Creating centralized functions

- Centralized intake process that reduces paperwork, giving caseworkers more time to support clients through crisis and help them get back to work
- Automated, risk-based eligibility verification



## With enabling technology and policy

- New digital tools and service modernization (easy-to-use online application, expansion of MyBenefits digital platform, 2-way digital messaging between clients and caseworkers)

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- SA One: Healthy, energizing workplaces; open communication that supports change; resilient organization; improved client relationships
  - Service continuity: Continuing to deliver service excellence and accountability through change



# Applications Now

- ❖ Ways applicants can apply:
  - by phone
  - walk in
  - online
- ❖ Steps to determination of eligibility:  
Intake Worker
- ❖ Steps to determination of eligibility:  
Caseworker
- ❖ Ongoing case management



# Applications Future

- ❖ Ways applicants can apply:

- by phone

- online

# Online

- ❖ Steps to determination of eligibility:

Intake Worker

- ❖ Steps to determination of eligibility:

Caseworker

- ❖ Ongoing case management



# Centralized Intake

## Components of Centralized and Automated Intake

### Social Assistance Digital Application (SADA)

- All Ontarians will apply for Ontario Works through the new, user-friendly online Social Assistance Digital Application (SADA)
- Applications received through SADA will be redirected to the central intake or municipalities (if not in the prototype launch)
- SADA will enable online identity verification (eID) and consent
- Municipalities will continue to process in-person and phone applications, or applications through Online Application for Social Assistance (OASA).

### Risk-Based Eligibility Determination (RBED)

- For prototype municipalities, applications received through SADA will go through a risk-based eligibility determination (RBED) framework.
- RBED is being built in partnership with Equifax and will validate the applicant's eligibility.
- RBED will give each application a risk level based on eligibility\*:
  - No risk, low risk and medium risk will be auto-granted.
  - High risk cases will require caseworker intervention.
- RBED will be released iteratively. Some complex cases (e.g. trustees, applicants under 18) will not go through RBED for launch.

\*Risk levels do not reflect case management needs

### Provincial Central Intake Unit

- A Provincial central unit will manage applications that come through SADA and RBED.
- For municipalities in the prototype, the Province will:
  - Review applications, resolve duplicates and merge applications in SAMS
  - Fill missing data fields for in-scope applications if required
  - Redirect cases that are not eligible for central intake and RBED to municipalities
  - Assess and grant new applications
  - Assess and assist with granting reapplications and applicants "known to SAMS"
  - Redirect cases that are high risk to municipalities for a decision

Success means that clients find it easier and faster to access social assistance and municipalities have more time for life stabilization activities





# Online Applications

- ❖ Centralized Intake Process:
  - all applications assigned to centralized team
  - assess application for risk
  - grant assistance and transfer to local office
  - deem ineligible and close case
  
- ❖ Exceptions to Centralized Intake Process:
  - under 18
  - does not pass risk assessment
  - deem to be complex



# Daily Function: Intake

## Will no longer:

- upload online application
- match and merge online application
- assign online application

## Will continue to:

- take requests for applications by phone
- match and merge telephone requests
- assign applications to Caseworker



## New Duties: Intake

- ❖ Assign applications deemed to be too complex by the Centralized Intake Process.
- ❖ Assign eligible cases completed by the Centralized Intake Process.



# Daily Function: Caseworker

## Will no longer:

- assess eligibility for prescribed online applications

## Will continue:

- to assess eligibility for applications requested by phone
- to assess eligibility for walk-in applications
- day to day case management, both employment and financial



# New Duties: Caseworker

- ❖ Determine eligibility for applications deemed too complex for the Centralized Intake Process.



# Considerations

- ❖ A high percentage of application requests are by telephone.
- ❖ Although online applications will be assessed by the centralized team, those granted must still be assigned to a Caseworker (this is currently a function of Intake).
- ❖ Applications deemed to be too complex for the Centralized Intake Process must be assessed by the local office and must be assigned to a Caseworker (this is currently a function of Intake).
- ❖ We do not know the risk assessment model that is employed by the Centralized Intake Process or the definition of “complex”.



# Questions

