



Date: December 21, 1998

To: Directors  
Employment and Income  
Assistance

From: Gerry Schmidt  
Executive Director  
Employment and Income  
Assistance  
305 – 114 Garry Street

Telephone:

Subject: **Annual Review Form – Revised**

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The Annual Review form has been revised to improve client service by introducing a shorter form. The new shorter Annual Review form will become effective January 1999 and will only **collect the information necessary to assess a client's continuing eligibility for income assistance.**

An authorization has been added to permit Employment and Income Assistance to collect personal information in accordance with section 36 of *The Freedom of Information and Protection of Privacy Act* (Manitoba) as well as section 13 of *The Personal Health Information Act* (Manitoba). Also, a separate section has been developed in consultation with Legal Counsel, to comply with the Revenue Canada requirements in order to continue sharing information.

### **PILOT PROJECT**

A pilot project was conducted in August 1998 to test the revised Annual Review form on 100 cases in two Winnipeg District Offices and one rural District Office. Feedback received from clients was positive as they found the new form easier to understand and complete. Staff stated that the new form was shorter, more to the point, easier to review and improved the data entry of information. Feedback from clients and staff was incorporated into the design of the revised form.

### **COMPLETED ANNUAL REVIEW FORM SUBMITTED TO DISTRICT OFFICE**

Staff will continue to assess the declaration, ensure that the Annual Review form has been submitted with complete information, continue or vary the income assistance based on the information provided, and enter the information into the **SAMIN** system. In situations where staff determine that there are financial eligibility or significant budget issues, the case must be referred to the Employment and Income Assistance Counsellor for appropriate follow-up.

### **INCOMPLETE ANNUAL REVIEW FORM SUBMITTED TO DISTRICT OFFICE**

When staff determine that the Annual Review form has been submitted with incomplete information, they are to return the Annual Review form to the client for proper completion using the "Incomplete Annual Review" or "Outstanding Annual Review" letters as per Directive #95-30.

## **UTILITY RECONCILIATIONS**

The utility section on the Annual Review asks clients to enclose all of their utility receipts or provide a detailed statement of cost from the utility companies for the past year.

A utility reconciliation must be completed only in the following situations:

1. The client has submitted their utility receipts or provided a detailed statement of cost;
2. Staff initiate the reconciliation to determine if the amount(s) allowed for the utility(ies) is reflective of the actual cost.

A client may request a utility reconciliation at any time as long as they provide their utility bills or a detailed statement of cost. If staff initiate the reconciliation, they will contact the utility companies directly to request a detailed statement of cost.