**Job Aid: Employment Related Financial Supports for Clients and Employers**

**1.0 Overview of Standard Process using Employment Related Financial Supports (ERFS)**

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| **Legend** | **Client** | **Service Provider** | **SSM** |

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| **General Process** | **Responsibility** | **Steps** |
| **Request Financial Assistance** | **Client** | * Client contacts EO Caseworker for employment related requests
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| **Process Request** | **Service Provider** | * Reviews Coordination of Benefits chart to confirm request is within SSM Guidelines; if the amount exceeds SSM Guidelines for an individual (eg. $1000.00), the Service Provider will need to contact SSM for approval
* EO caseworker collaborates with SA caseworker if required
 |
| **Approve/Deny****Financial Request** | **Service Provider** | * Approve or Deny Financial Request; request additional information
* Follow internal process to issues funds to client
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| **Submit Required Documentation** | **Client** | * Client purchases employment related supports and submits an itemized receipt to SP
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| **Service Provider** | * Once itemized receipt received, Service Provider edits EAP plan item, uploads documents to CaMS, and submits receipt to SSM

*Note: Some documentation may not be acceptable forms of evidence (see below)* |
| **SSM Review** | **Service Provider** | * Once documentation received, SP to upload additional documents to CaMS (see steps below)
* If request denied and returned from SSM, Service Provider to follow internal process to obtain proper information and resubmit to SSM

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| **SSM** | * Review submitted documentation
* Approve or Deny submissions for reimbursement
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*Note: Client Supports should be reported by service providers to the SSM in CaMS within 3 business days of issuing the expenditure. After the details have been reported, the SSM will review for approval.*

*Employer Supports should be reported by service providers to the SSM in CaMS within 15 business days of completing the placement. All reports will be reviewed and must contain all required information, including attachments of evidence of the expenditure and the Training Incentive Placement Agreement.*

**1.2 Required Documentation**

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| Employment Related Financial Support Requests: Approved Documentation |
| Job Seeker Financial Requests | Itemized Receipts; Invoices, Purchase Orders vouchers etc.*(The service provider should retain the original documents on file per the requirements of their funding agreement).* |
| Employer Supports | Training Incentive Placement Agreement and paystubs |

*Note Documentation considered* ***NOT*** *eligible for evidence of expenditures:*

* *Any gift cards provided to clients should be accompanied by an itemized receipt of what was purchased (there is an exception for gas gift cards)*
* *Screenshots of accounts or account payments will not be considered as evidence*
* *Debt payments are not considered legitimate expenses without SSM pre-approval*
* *Purchases from individuals (e.g., handwritten receipts from a buy and sell online group) are not eligible*
* *Credit card receipts without itemized receipts will not be accepted, (e.g., $30 visa charge at a gas station without the receipt to show that gas was purchased)*

**1.3 Job Seeker and Employer Financial Request: How to Add Attachments in CaMS**

1. From the home page of the Employment Action Plan, select the “**PLAN CONTENT**” tab
2. From the Plan Content page, toggle into the designated Financial Support Sub-Goal and select the plan item’s ellipses; click “**ADD ATTACHMENT**”
3. On the Add Attachment page, complete all fields; use the browse feature to upload the required documents to CaMS (Document Type, New File, Receipt Date, Description)
4. Click “**SAVE**”

**1.4 Complete an Employment Related Financial Support Plan Item and Submit for Review**

1. From the Employment Action Plan home page, select the Plan Content Tab
2. On the Plan Content page, toggle in to the relevant Sub-Goal
3. Click “**EDIT**” PLAN ITEM from the ellipses next to the relevant plan item
4. The Modify Plan item page will open; complete the necessary fields you would like to edit
5. To complete a Plan Item, complete all fields: Actual End Date, Outcome, Cost, HST, Receipt Date, Rationale and Comments if applicable
6. Check the box “Ready for Review”
* *NOTE: Only when the documents have been received and attached would you submit the verification to SSM. The plan item can be edited once an end date and outcome have been assigned. When editing plan item check the box ‘Ready for Review’ and click ‘****SAVE****’*
1. Click “**SAVE”**
2. The Status has now changed to “**COMPLETED**” and the Outcome has now changed to “**ATTAINED**” and is displayed on the Plan Content home page

**1.5 Eligible Expenses**

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| **Expense Category** | **Examples** |
| Technology  | Pre-paid card for cell-phone coverage Internet hotspots Devices needed for employment-related activities |
| Short-term transportation expenses  | Transit fare, gas costs, or car insurance to attend employment-related activities or for onboarding a new job |
| Work clothing or grooming  | Clothing or grooming needed for employment related activities such as a job interview or for onboarding a new job |
| Special equipment and supplies  | Safety equipment (e.g., work boots, safety vest) needed for employment-related activities or onboarding a new job (except for employer-provided personal protective equipment) |
| Costs related to occupational certification  | Taking an exam Obtaining documentation verifying completion of educational/skills training requirementsLanguage skills assessment Academic credential assessmentTranslation of international academic documents |
| Short-term training costs (to be completed within 3 months) | Registration feesTools to complete trainingClient stipends |
| Emergency/infrequent childcare (up to maximum of 2 weeks) | One time childcare (or up to a maximum of 2 weeks) to attend employment-related activities or onboarding a new job |
| Work-related disability supports (for those who self-identify as having a disability) | Diagnostic assessments of employment capacitiesWork-related assistive devicesAdaptive technologyJob specific communication skills trainingOn-the-job supports such as sign language interpreter, reader, note taker Others as deemed appropriate |

*Note: Pre-approval of expenses is required by the SSM prior to confirming coverage to a client and providing payment for the expense or ordering the expense in the following circumstances:*

* The total amount of the individual item exceeds $1,000.00
* Total ERFS used for the specific client exceeds $3,500.00 over the course of their Employment Action Plan.
* The proposed expense is related to servicing debt (e.g., cell phone debt, car payments)
* The proposed expense is not listed in the Eligible Expenses chart above