

Job Aid: Employment Related Financial Supports (ERFS) for Job Seekers and Employers

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

Legend	Client	Service Provider	WREN
General Process	Responsibility		Steps
Request Financial Assistance	Client		<ul style="list-style-type: none"> Client contacts EO Caseworker for employment related requests
Process Request	Service Provider		<ul style="list-style-type: none"> Reviews Coordination of Benefits chart to confirm request is within WREN Guidelines; if the amount exceeds WREN Guidelines for an individual (e.g. \$1000.00), the Service Provider will need to contact the WREN for approval EO caseworker collaborates with SA caseworker if required
Approve/Deny Financial Request	Service Provider		<ul style="list-style-type: none"> Approve or Deny Financial Request; request additional information Follow internal process to issue funds to client
Submit Required Documentation	Client		<ul style="list-style-type: none"> Client purchases employment related supports and submits an itemized receipt to Service Provider
	Service Provider		<ul style="list-style-type: none"> Service Provider edits and completes EAP plan item, uploads document(s) to CaMS when received, and submits receipt to the WREN If document is pending, plan items can be completed however the Service Provider would not submit to the WREN for review <p><i>Note: Some documentation may <u>not</u> be acceptable forms of evidence (see below)</i></p>
WREN Review	Service Provider		<ul style="list-style-type: none"> Once documentation is received, Service Provider to upload documents to CaMS (see steps below under CaMS Processes) If request has been rejected and returned from the WREN, Service Provider to obtain proper information and resubmit to the WREN
	WREN		<ul style="list-style-type: none"> Review submitted documentation Approve or Deny submissions for reimbursement

Note: Client Supports should be reported by service providers to the WREN in CaMS within 3 business days of issuing the expenditure. After the details have been reported, the WREN will review for approval.

Employer Supports should be reported by service providers to the WREN 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

Employment Related Financial Support Requests: Approved Documentation	
Job Seeker Financial Requests	Itemized Receipts <i>(Service providers should retain the original documents on file per the requirements of their funding agreement).</i>
Employer Supports	Signed Training Incentive Placement Agreement (TIPA)

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 WREN 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)

CaMS Processes related to ERFS

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

Prerequisite: Complete the required steps to add Job Seeker plan item under the [Job Seeker Financial Supports Sub-Goal](#).

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 (*Employer Financial Supports or Job Seeker Financial Support*) 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, and 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 into the relevant Sub-Goal.
3. Click **“EDIT”** PLAN ITEM from the ellipses next to the associated 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. Only check the box **“Ready for Review”** when the documents have been received and attached. (e.g., If receipts/TIPA are still pending, do not check the box for **“Ready for Review”**)
Note: Plan Items can be edited once an end date and outcome have been assigned
7. Click **“SAVE”**.
8. 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 Review and Action Rejected Employment Related Financial Supports (ERFS)

NOTE: *Ensure widgets are added to workspace. Click the wrench symbol on the workspace page. Check off Resubmission Required- Financial Supports. Click save.*

1. From the Workspace page, navigate to the **“Resubmission Required-Financial Supports”** widget.
2. Here you will see the client’s name, the Financial Support Name that has been rejected, and the WREN rejection date.
3. Click the name of client to open the Employment Action Plan home page and select the Plan Content tab.
4. From the Plan Content tab find the ERFS that has been rejected (e.g., *Employment-Related Transportation*) and use the arrow on the left hand side to toggle into the plan item to review rejection reason (e.g., missing information, attachment not legible, etc.).
5. Once the appropriate proof/document (e.g. Itemized Receipt) has been updated or submitted, click on the ellipses of the desired plan item and select **“Add Attachment”**.
6. Use browse feature to upload the new document. Update description details (if needed).
7. Click **“Save”**.
8. From the Plan Content page, click on the ellipses of the desired plan item and select **“Edit Plan Item”**.
9. Review that details remain accurate; update if needed.
10. Check off the **“Ready for Review”** box.
11. Click **“Save”**.

1.6 Eligible Expenses

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 (note that gas gift cards can be used as a last resort, should not be purchased in bulk, and should not be for a denomination over \$100) Vehicle repairs required for automobile to pass a safety and obtain a safety standards certificate Note: Receipts are NOT required for transportation expenses that are \$100 or less
Work clothing or grooming	Clothing or grooming needed for employment related activities such as a job interview or for onboarding a new job. Note: Receipts are NOT required for work clothing and/or grooming expenses that are \$100 or less
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)
Medical supports	Glasses, hearing aids (if required for training or onboarding and not covered by Social Assistance benefits)
Costs related to occupational certification	Taking an exam, professional certifications, licensing Obtaining documentation verifying completion of educational/skills training requirements Language skills assessment Academic credential assessment Translation of international academic documents Onboarding expenses such as: medical exams, security check, drivers' licence abstracts Union dues to maintain member's good standing
Short-term training costs (to be completed within 3 months)	Registration fees Tools to complete training Client 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 capacities Work-related assistive devices Adaptive technology Job specific communication skills training On-the-job supports such as sign language interpreter, reader, note taker Others as deemed appropriate

*Mental health supports	Cost of services, resources, or specialized knowledge beyond the reasonable expectations of service delivery using operational funding
*Interpretation supports	Interpretation services administered verbally required to address language barriers when completing the Common Assessment and/or developing and managing the client's Employment Action Plan
*Specialized job coaching	Cost of services, resources, or specialized knowledge beyond the reasonable expectations of service delivery using operational funding

*** Note:** *These supports are eligible per the Ministry's updated ERFS Pilot Project guidelines to assist individuals with complex employment barriers. They can be delivered internally by Service Providers, but only if the program/service is not directly funded through IES operational funding. Service Providers are required to verify and demonstrate that Ministry-funded IES staff have not provided these supports.*

Pre-Approval

Expenses not included on the list above may be considered on a case-by-case basis in consultation with the WREN. Service Providers should consult their Quality Assurance Coordinator when these situations arise.

Pre-approval of expenses is required by the WREN 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.