



## Memorandum

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Date: June 13, 1995

To: Directors of Income Security

From: Gerry Schmidt/Helmut Klein  
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Income Security &  
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Subject: **New Home Visit Policy & Guidelines – Effective June 8, 1995**  
**(Administrative Manual Update 95-05 (pages CO 21-04 and CO 21-05;**  
**Index pages AO 00-02 and CO 00-02)**

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Based on the recommendations from the Workload Committee, this directive announces changes to the home visit policy for all social allowances cases. Guidelines are also introduced to assist Income Security Counsellors in determining which cases require a home visit.

Rather than respond to an automated schedule for home visits, the new home visit policy allows Income Security Counsellors to focus on clients assessed as having the most potential for self sufficiency or for whom program control and verification issues have been identified. Income Security Counsellors will now:

1. conduct a home visit or other forms of client contact when a need has been identified;
2. waive the home visit when there is no apparent need; and
3. have the flexibility to schedule time for home visits and client contact more efficiently.

**1. HOME VISIT POLICY – PURPOSE OF A HOME VISIT:**

The Income Security Counsellor's visit to the home of a recipient is an important form of client contact. Home visits allow the Income Security Counsellor to focus significant attention on recipients. Home visits have 4 specific objectives:

1. to promote recipients' self sufficiency
2. to exchange information;
3. to determine other agency involvement; and
4. to examine verification/control issues.

It may be necessary to conduct a home visit to follow-up on questions or concerns raised by the client, to discuss the recipient's employment or training plans, to verify information, to assess third party complaints or to investigate alleged program abuse. Home visits may also be conducted at the request of the District Director or designate.

## 1. HOME VISIT POLICY – PURPOSE OF A HOME VISIT: (cont'd)

When appropriate, other forms of clients contact (e.g., office visit, telephone contact, informal personal contact in the community, other worker contact) may be used instead of the home visit to review issues relevant to the Social Allowances Program.

## 2. DECISION TO CONDUCT A HOME VISIT:

Effective June 8/95, for all cases, Income Security Counsellors have the discretion to conduct the home visit where a need has been identified or to waive the home visit for cases when there is no apparent need.

Cases with the greatest potential for self-sufficiency or reduced dependency, and cases where program verification and control issues have been identified, are to be given the highest priority for home visits. New/re-enrolled and transfer-in-cases are to be given a high priority for home visits for verification and control purposes.

When a file is transferred in, the Income Security Counsellor must review the home visit requirement or exemption to determine if it continues to be appropriate.

Income Security Counsellors may conduct as many home visits as are determined to be necessary based on the recipient's circumstances.

Please refer to the "Home Visit Guidelines" when assessing cases for home visits.

## 3. FILE RECORDINGS:

### A. Decision to Waive Home Visit

When the Income Security Counsellor determines the case is to be home visit exempt, the specific reason is to be documented on the Case Management Intake Record or the Case Management Record, and the appropriate home visit exemption code entered into SAMIN.

### B. Decision to Conduct Home Visit

When the Income Security Counsellor determines that the case requires a home visit, the home visit date will be displayed in SAMIN. Should the Income Security Counsellor decide to make a home visit prior to the date displayed, a next home visit date will be entered. The next home visit date entered in SAMIN cannot exceed 2 years from the last home visit date.

Following the home visit, the Income Security Counsellor must document the purpose of the home visit, describe the major areas discussed during the visit, and record any follow-up action required.

## 4. ENHANCEMENTS TO HOME VISIT EXEMPTION CODES

Effective June 9/95, the following new home visit exemption codes are available in SAMIN:

### 1) NV (No Visit)

This new code will be used when cases are assessed as not requiring a home

visit or when no other home visit exemption code applies.

**2) DC (Dangerous Client) &**

**3) DR (Dangerous Residence)**

The DC and DR codes replace the DA (Director's Approval) code. When the DR code is used, a review will be required after the client moves.

Use of the DA code is to be discontinued as of June 9/95. Cases exempted under the DA code prior to the June 9/95 must be reviewed and the appropriate code substituted before December 31/95.

Information will be provided on further SAMIN enhancements currently in development. These changes consist of:

**1) GA Code Suspended**

The GA code will be discontinued in the fall of 1995 and eliminated by Dec./95.

Effective Oct./95, the system will no longer default to the GA home visit exemption code for cases enrolled under the GA category. Prior to Oct./95, GA cases must be reviewed to determine whether a home visit is required or should be waived under an appropriate exemption code.

**2) OW Code Suspended**

The OW codes will be discontinued in the fall of 1995 and 2 new codes made available:

- **MH (Mental Health Client With Mental Health Worker) &**
- **MC (Mentally Challenged Client with Community Services Worker Involvement).**

**3) DA, OW and GA codes Eliminated**

These codes will be eliminated from the SAMIN system in Jan./96.

**5. MONITORING OF POLICY IMPLEMENTATION**

Through file reviews of new/re-opened and on-going cases, District Directors are to monitor the Income Security Counsellor's file recordings of home visit exemptions and home visits conducted.

District Directors are to maintain a record of this file review of no less than 5% of the caseload for each Income Security Counsellor on an annual basis.

SAMIN reports are being developed to assist in monitoring policy implementation. Instruction regarding the use of these reports will be issued under separate cover. These reports will consist of:

**1. Home Visits Listing by Exemption Code**

The "Home Visit Listing" will display cases by the home visit exemption code for each Income Security Counsellor. It will include the case number, case name, postal code and annual review date.

**2. Summary of Exempted Home Visits By District Office**

It is anticipated that this report will be available by Oct./95. This report will list the total/percentage of home visit exemption codes for each Income Security Counsellor and for the District Office. This report will provide District Directors with an overview of the home visit exemptions in each Income Security Counsellor's caseload.

**3. Provincial Summary of Exempted Home Visits**

It is anticipated that this report will be available by Jan./96 and will list the total/percentage of home visit exemption codes for each District Office and for all District Offices.