Daily Schedule:
Start: 9:00AM End: 5:00PM Breaks: 15mins @ 10:30AM and 2:30PM, 1 Hour at 12:00PM

Run the **GWA-OW Calculator** software by double-clicking on the icon found on your desktop. Type in **ADMIN** in the username field and **ADMIN** in the password field and then click the OK button.

Topics To Be Covered In This Module: Case Intake / Update Screens & Procedures

- ☐ **Client Access Screen**
  - ☐ How to quickly search for applicants
  - ☐ Applying various filters

- ☐ **“Basic Information” - Case / Benefit Unit Information**
  - ☐ Case IDs: the recommended methods and why you should use them
  - ☐ Data entry techniques, tips & tricks with various fields
  - ☐ Reason for applying – proper code use and starting dates
  - ☐ Reason for terminating – proper code use and statistics discussion
  - ☐ Setting case flags properly and how this affects your entitlements, payments, claims, etc.
  - ☐ Payment methods:
    - ☐ Cheque
    - ☐ Debit Card Payments (e.g. Northern Store)
    - ☐ Direct Bank Deposit
  - ☐ Identifying clients that should be put on hold
  - ☐ Tracking cases referred to ODSP
  - ☐ **“Spouse Info” Tab**
    - ☐ Transferring a spouse to another case file
    - ☐ Converting a spouse to a new case file – when to use it and why
  - ☐ **“Children Info” Tab**
    - ☐ Transferring Dependents Between Case Files
    - ☐ Setting up a “Holding” file

- ☐ **“Form 1 Information” – Application For Assistance: Part 1**
  - ☐ Proper input of information, restrictions/limitations and/or workarounds

- ☐ **“Verification Checklist”**
  - ☐ Default follow-up periods, how and when to override them
  - ☐ How the information ties into the 30/60/90 days past due notices the system can create

- ☐ **“Caseworker Notes”**
  - ☐ Why you should use the notes.
  - ☐ Using note types and categories to organize your notes.
  - ☐ Using the “Bring Forward” date.
  - ☐ Using filters when reviewing and printing notes.
  - ☐ “Finalizing” notes for security purposes.
  - ☐ Printing Notes: Sorting, paper layouts, etc.

- ☐ **“Entitlement Calculation”**
  - ☐ When to update budgets and when it is not required
  - ☐ **“Benefit Unit & Shelter” Tab**
    - ☐ Accessing the Special Diet schedule lookup
    - ☐ Data entry and how it ties into the Form 1
  - ☐ **“Earnings & Income” Tab**
    - ☐ Earnings Exemption scenarios
  - ☐ **“Ontario Works” Tab**
    - ☐ Overpayment Recovery: manual and automatic features
    - ☐ Pro-rating Entitlements
  - ☐ **“Discretionary & Mandatory Benefits” Tab**
  - ☐ **“100% Provincial” Tab**
    - ☐ Using the TCB benefit and repayment calculator spreadsheets
    - ☐ Setting the review date
  - ☐ **“Suppliers & Summary” Tab**
    - ☐ Deductions (or Pay Directs) for monthly clients.
    - ☐ When to use supplier deductions / pay directs.
    - ☐ Adding Suppliers “on the fly”.
    - ☐ Removing a supplier deduction / pay direct.

- ☐ **“Income Statement History”**
  - ☐ Entering statements for earners in the benefit unit
  - ☐ How these are used in your Employment Assistance Statistics report

- ☐ **Bring Forward / Reminders**

- ☐ **Files Links**

- ☐ **Age Of Benefit Unit Members**

- ☐ **Printing Out Mandatory Reports & Forms**
  - ☐ Client Information (including Budget Worksheet Info)
  - ☐ Application For Assistance – Part 1: Financial Assistance
  - ☐ Application For Assistance – Part 2: Participation Agreement (includes filling part of it out)
  - ☐ Consent To Disclose
  - ☐ Verification Checklist
  - ☐ Rights & Responsibilities
  - ☐ Declaration Of Support & Maintenance
  - ☐ Authorizations – when & why you should use them
  - ☐ Literacy Screening Test – when to print them
  - ☐ Pregnancy/Breast-feeding Allowance
  - ☐ Special Diet Allowance
  - ☐ Temporary Care Allowance

- ☐ **Miscellaneous**
  - ☐ **Search For Name:** How to look for a person referenced somewhere in the system
  - ☐ **Bulk Caseworker Notes:** Entering “bulk” caseworker notes (one note to many case files)