

Implementing Centralized Intake for Social Assistance in Toronto

Date: May 13, 2022

To: Economic and Community Development Committee

From: General Manager, Toronto Employment and Social Services

Wards: All

SUMMARY

In May 2021, Toronto Employment and Social Services reported to Council with details of Ontario's plan for Social Assistance Renewal and Employment Service Transformation. There are three broad areas of change. First, Social Assistance Renewal will result in significant changes to provincial and municipal roles for social assistance — both Ontario Works and Ontario Disability Support Program. It is initially focused on realigning functions between the Province and municipalities to provide more efficient, person-centered supports for clients. Second, Employment Service Transformation will integrate Ontario Works and Ontario Disability Support Program employment services into Employment Ontario and establish Employment Service System Managers for each delivery region. Toronto Employment and Social Services will provide a report back to Council on Employment Service Transformation in July 2022. Finally, Human Services Integration is the Province's long-term vision which is intended to ensure all low-income residents (not just those in receipt of social assistance) can access caseworker support and a range of local human services. There are no current timelines for this phase of change and Toronto Employment and Social Services will report back to Council as more details are available.

This report addresses a critical and initial element of the Social Assistance Renewal plan — the Centralized Intake process — which aims to improve the client experience when applying or reapplying for Ontario Works by leveraging a new user-centric online application and automated, risk-based eligibility verification process. Centralized Intake is designed to simplify the Ontario Works application process for clients and reduce administration, allowing caseworkers more time to support clients while also automating and strengthening program integrity elements at the application stage. Centralized Intake was launched in a phased approach with prototype sites established across the Province beginning in Fall 2020. Following close collaboration with the Province and extensive planning with regard to design and implementation, Toronto's Centralized Intake prototype was launched February 28, 2022.

Prior to the introduction of Centralized Intake, the 3 channels to apply for Ontario Works (in-person, online and phone) were all managed by the City. The initial introduction of Centralized Intake saw the administration of online applications move from the City to

the Province. Notably, eligibility requirements have not changed. The future vision of the Province is that both online and phone applications will be managed by the Province, while in-person will continue to be the responsibility of municipalities. The transition of the City's phone channel for Ontario Works applications will proceed at a future date, to be determined by Q4 2022.

This report focuses on the first phase of change (the centralization of the online channel to the Province). It provides an initial overview of the implementation of Centralized Intake and sets the foundation for future broader changes and impacts. There are no anticipated impacts on funding or staffing, and residents applying for assistance will continue to have the choice of which application channel best suits their needs. Many will benefit from a simpler, more user-friendly online system, with a streamlined first payment process. Staff will report back in Q1 2023 with further updates on the implementation of Social Assistance Renewal, as well as the next phase of Centralized Intake, the transition of phone applications to the Province and the implications for the City's Application and Support Centre (which is housed within Social Development, Finance and Administration) and Human Services Integration initiative.

RECOMMENDATIONS

The General Manager, Toronto Employment and Social Services recommends that:

1. City Council direct the General Manager of Toronto Employment and Social Services, in consultation with the Executive Director of Social Development, Finance and Administration, to report back in Q1 2023 on the next phase of Social Assistance Renewal, including timelines, roles and budget related to the shift towards the Provincial benefits administration and program risk management, along with an update on the implementation of Centralized Intake in Toronto, including the centralization of Ontario Works phone applications.

FINANCIAL IMPACT

There are no financial impacts resulting from the recommendations in this report.

Ontario's plan for Social Assistance Renewal is a multiphase, multiyear initiative that will shift the functional focus of the City from eligibility determination and the administration of benefits and employment supports to the provision of stability supports and service navigation for social assistance clients. This realignment of social assistance delivery and functional responsibilities is expected to be revenue neutral, with savings from administrative centralization reinvested in the expansion of stability supports for City residents.

The Chief Financial Officer and Treasurer has reviewed this report and agrees with the financial impact information.

EQUITY IMPACT

The Social Assistance Renewal plan will result in changes for some low-income residents including racialized communities and those with disabilities. Overall, the focus on reducing local administration and thus enabling more time for caseworkers to build trusting and empowering relationships with clients, will be positive. Technical enhancements in the application process and technology will provide clients applying online with a more user-friendly, mobile compatible platform, with e-ID and e-signature capability, and some clients will receive their first payment faster and before speaking to a caseworker.

Overall, many clients will experience a simpler, faster, more user-friendly system. Clients can continue to choose to access the application channel (in-person, online, phone) that best meets their needs. Clients whose applications require additional review or who need in-person support will continue to get access and services directly from TESS through this "no wrong door" approach.

DECISION HISTORY

On May 5 and 6, 2021, City Council directed the General Manager, Toronto Employment and Social Services to report in the second quarter of 2022 on the co-design and implementation of Phase 1 of Ontario's Social Assistance Recovery and Renewal plan, including updates on the impact of the centralization of Ontario Works financial assistance application administration on related roles and functions at the City of Toronto's Application and Support Centre and Toronto Employment and Social Services, budget implications for the City of Toronto, and progress on the Provincial plan for human services integration.

<http://app.toronto.ca/tmmis/viewAgendaItemHistory.do?item=2021.EC21.2>

COMMENTS

On September 30th, 2020, the Ministry of Children, Community and Social Services shared details of the provincial Social Assistance Renewal plan, including the roll out of an automated, Centralized Intake process. Social Assistance Renewal is a multiphase, multiyear initiative that will result in significant changes to provincial and municipal roles for social assistance — both Ontario Works and Ontario Disability Support Program. When fully implemented, it will shift the functional focus for municipal delivery partners from eligibility determination and the administration of benefits and employment supports to the provision of stability supports and service navigation for social assistance clients.¹

¹ Stability supports' refers to the broad range of services and supports, including mental health and addictions, child welfare, youth programs, healthcare and housing, that people may need in order to improve / maintain health, safety and well-being and enable sustainable progress. In many cases, stability supports are an essential pre-condition for enhancing employability and employment outcomes.

There are three broad areas of change:

- **Social Assistance Renewal** is initially focused on realigning functions between the Province and municipalities to provide more efficient, person-centered supports for clients. A primary focus of this work (and of this report) is Centralized Intake. Subsequent changes will see further administrative centralization, including mandatory financial benefits administration, ongoing eligibility assessment and program compliance and integrity management.
- **Employment Services Transformation** will result in the integration of Ontario Works employment assistance and Ontario Disability Support Program employment supports into Employment Ontario and the creation of new Employment Service System Managers for each delivery region. Toronto Employment and Social Services will provide a detailed report back to Council on this work in July 2022.
- **Human Services Integration** is the Province's long-term vision. The goal is to ensure all low-income residents (not just those in receipt of social assistance) can access one-on-one support from a caseworker and be connected to a range of local human services. There are no current timelines for this phase of change and Toronto Employment and Social Services will report back to Council as more details are available.

In May 2021, Toronto Employment and Social Services reported to Council with details of the Social Assistance Renewal plan and related Employment Service Transformation. The report noted that many aspects of the plan — especially the emphasis on stability supports, human services coordination and expediting access to benefits and streamlining administrative processes — are positive and reflect previous City positions and actions. The City's focus in recent years on enhanced service planning with Ontario Works clients, greater investment in stability supports, and the City's own Human Service Integration initiative, means that Toronto has a firm foundation to build on and is well-positioned to work with the Province to inform and advance change.

Toronto Employment and Social Services' report also noted that Social Assistance Renewal does not include changes to the amount or adequacy of benefit rates and recommended that the Province implement a new and modernized rate structure that uses an evidence-based approach to annual social assistance rate increases. The rapidly increasing cost of living, with inflation currently running at 30-year highs, means that this recommendation has taken on a new urgency. While Toronto Employment and Social Services continues to work closely with the Province to co-design a more effective and efficient social assistance system, the ability of clients to stabilise their lives and progress toward self-sufficiency also requires rates that ensure they can meet their basic needs.

Centralized Intake

Centralized Intake seeks to improve the client experience when applying or reapplying for Ontario Works by leveraging a new user-centric online application and automating initial eligibility determination. It is also intended to reduce application administration, Implementing Centralized Intake for Social Assistance

giving caseworkers more time to support clients through crisis and support their employment goals. Finally, automated and smarter eligibility determination with provincial, federal and third-party verification sources — that is underpinned by a new risk-based approach — will make financial assistance processing faster while strengthening program integrity. Attachment 1 provides additional information on the purpose and key features of Centralized Intake which include:

- A new online application for social assistance — Social Assistance Digital Application — which is user-friendly, web-responsive, mobile compatible and allows real-time, electronic verification of client ID and e-signatures;
- A new Risk-Based Eligibility Determination approach that determines the risk level associated with an application and the timeline for verification based on the extent the applicant's information is corroborated. Third party checks identify cases with inconsistent information that require a more detailed assessment; and
- Municipal responsibility for completing post-grant activities within the time frame established by the Province and determined by the Risk-Based Eligibility Determination assessment. For example, when an application is deemed "high risk" or when an exception applies, the applicant is redirected to the municipality to determine eligibility.

Centralized Intake was launched by the Province in a phased approach, with cohorts of municipalities onboarded at different times. The initial group of seven prototype sites launched in November 2020. Subsequent prototypes were rolled out in phases between February and June 2021, and Centralized Intake has now expanded to 35 delivery partners across Ontario. This gradual approach allowed the Ministry to test the new process with a limited number of users before expanding roll-out to include additional locations and program elements. Given its uniqueness, especially with regard to the size and composition of the caseload and its existing Human Services Integration model, Centralized Intake began in Toronto on February 28th, 2022. Launching at this later stage also provided an opportunity to learn from initial implementation experiences elsewhere and to minimize any potential challenges for local residents.

Prior to the introduction of Centralized Intake in Toronto, the 3 channels to apply for Ontario Works (in-person, online and phone) were all managed by the City. The initial introduction of Centralized Intake saw the administration of online applications move from the City to the Province. Notably, eligibility requirements have not changed. The future provincial vision is that both online and phone applications will be managed by the Province, while in-person will continue to be the responsibility of municipalities. The transition of the City's phone channel for Ontario Works applications will proceed at a future date to be determined by Q4 2022.

Robust compliance and integrity measures continue to exist in the program, with many aspects being automated and integrated. Importantly, these measures are no longer tied to client-caseworker relationships. This change accelerates an ongoing shift in how social assistance is delivered in Ontario — from enforcement-based to risk-based approaches. Centralized Intake assumes that clients provide accurate information required to assess eligibility. This enables a starting point of trust and support and mirrors the work and changes that Toronto Employment and Social Services has

introduced in building positive service planning relationships with clients as the key to future progress.

Toronto's Prototype Model

Significant planning and preparation was undertaken to inform the launch of Centralized Intake in Toronto. At the heart of this work there has been close collaboration between Toronto Employment and Social Services and the Ministry and a shared commitment to co-design. Toronto Employment and Social Services has worked closely with the Ministry through various planning tables and project teams to co-design Centralized Intake in Toronto and ensure the successful implementation of the most appropriate approach.² For example, the existence of the City's Application and Support Centre³ (which is housed within Social Development, Finance and Administration) allowed for a customized, gradual implementation of Centralized Intake with an initial focus on online applications. This phased approach to Centralized Intake implementation allowed for capacity to be built at the Province to accommodate the volume of Ontario Works applications in Toronto and to ensure a gradual implementation that enables client experiences to inform and improve Centralized Intake over time.

As a result, Toronto has adopted a slightly different prototype model compared to other municipalities across the province (Attachment 2 provides a high level overview). In all other prototype sites, for example, the online and phone application channels have been simultaneously uploaded to the Province. Toronto will retain the phone channel until the Ministry achieves resource and process readiness to effectively take on Toronto's call volumes. To summarise the changes in Toronto:

- The Province has begun to process Toronto's Ontario Works applications that are submitted through the online channel, using the new Social Assistance Digital Application and Risk Based Eligibility Determination technology;⁴
- While all other prototype municipalities have uploaded both their phone and online channel to the Ministry, Toronto's Application and Support Centre is maintaining responsibility for processing all Ontario Works phone applications for Toronto residents and roles and responsibilities remain the same at this time;

² For example, Toronto Employment and Social Services, along with initial municipal prototypes, has been part of the Province's Joint Project Team. The City has also engaged in regular bilateral meetings with senior Provincial staff to frame out an approach and develop an implementation plan to leverage Toronto's human services integration experience/maturity to meet Social Assistance Renewal objectives. Finally, Toronto established a Centralized Intake Project Team that worked directly with the Ministry to address both technical and policy issues relevant to the Toronto Employment and Social Services and City of Toronto context and undertook broad engagement and developed a comprehensive training plan to support successful implementation.

³ Through the City of Toronto's Human Services Integration model, the City's Application and Support Centre takes phone applications (416-338-8888) for Ontario Works on behalf of Toronto Employment and Social Services, while providing callers with information and access to a range of other income support programs available at the City.

⁴ Social Assistance Digital Application is a new, online application for social assistance and Risk Based Eligibility Determination is the new, automated risk assessment process. Details on this and other key features of Centralized Intake are listed in Attachment 1.

- Toronto Employment and Social Services also continues to process all in-person applications, applications for Emergency Assistance and Temporary Care case types, as well as in-person applications for clients in urgent need, which are all intended to remain the responsibility of municipalities. In addition, Toronto Employment and Social Services will process online Ontario Works applications redirected from the Ministry that require immediate client support;
- Caseworkers will continue to action follow-up required at the Initial Service Planning appointment, complete Outcome Plans, and service plan with clients; and
- The responsibility for processing Toronto's phone applications will transition to the Province (to be determined by Q4 2022), upon further assessment of staff and client experiences, as well as input from lessons learned from other prototypes.

While notable impacts and implications of these changes for Toronto are noted briefly below, the majority of clients will experience a positive change. For example:

- Moving to risk-based eligibility determination represents another step forward in what has been an evolving shift in the approach to delivering social assistance;
- Applicants will be assumed to have provided accurate information required to assess eligibility (while third party checks will identify cases with inconsistent information that require a more detailed assessment);
- The emphasis is on building trusting and empowering relationships between clients and caseworkers;
- Clients applying online through Social Assistance Digital Application will experience a more user-friendly, mobile compatible platform, with electronic verification of client ID and e-signature capability;
- There will be no change for clients applying in-person or by phone, or for clients applying online for Emergency Assistance or Temporary Care Assistance;⁵
- For most clients, the process will be streamlined and some will receive their first payment automatically and before speaking to a caseworker. Some clients with more complex circumstances will continue to need additional support with their application, as they do now. Similarly, those deemed high risk will need to provide additional information as they also currently do; and
- Toronto will also maintain its “no wrong door” approach so that clients can access the application channel (in-person, online, phone) that best meets their needs.

Since the launch of Centralized Intake in late February 2022, the City and the Province have worked together to closely monitor and assess the initial implementation. In particular, the focus is on determining the extent to which the application process is operating as anticipated, as well as specific impacts on both client experiences and staff

⁵ Emergency Assistance provides immediate financial assistance for up to 48 days to an applicant in a crisis or emergency situation who has no access to other supports. A person who receives emergency assistance does not have participation requirements and might not otherwise qualify for regular ongoing Ontario Works assistance. Applications for Emergency Assistance can be made online using the Online Application for Social Assistance or via phone or in-person channels. Temporary care assistance and benefits can be paid to an adult who is providing temporary care for a child who is in financial need and is not a dependant. Applications can be made online using Online Application for Social Assistance or via phone or in-person channels.

functions and roles. To date, at this early stage of prototype implementation, the administrative roles and processes have been working as designed and staff and client service experiences are being monitored. The commitment to prototyping means that the model will iterate and evolve in response to these learnings. Detailed updates on the implementation will be provided in a subsequent staff report in Q1 2023.

Summary and Next Steps

Toronto's Centralized Intake prototype, carefully crafted through extensive provincial-municipal collaboration and co-design, will be further adjusted and improved based on real-time learning and experience. In addition, Centralized Intake is only the first phase of the broader Social Assistance Renewal plan designed to transform social assistance in Ontario. Phase 1, which includes the rollout of Centralized Intake, focuses on realigning the application functions between the Province and municipalities. Subsequent phases will focus respectively on realigning a range of program administration responsibilities — including the shift to municipal delivery of enhanced case management support for Ontario Disability Support Program clients — and more broadly integrating human services at the provincial level.

When fully implemented, Social Assistance Renewal will shift the functional focus for municipal delivery partners from eligibility determination and the administration of benefits and employment supports to the provision of stability supports and service navigation for social assistance clients. Ontario's longer term vision includes broader human services integration that extends stability supports and service navigation to all low-income residents.

While further change is anticipated, it is important to note that future funding impacts have not yet been confirmed. Provincial funding in 2022 remains unchanged from 2021 and it is anticipated that the funding will remain constant in 2023. Likewise, staffing impacts are also not anticipated as a result of Social Assistance Renewal during this time as the changes involve re-alignment of functions within existing staffing levels, with any resulting changes to work activities continuing to align with and be re-allocated within current staff roles — the majority of caseworkers, who are not assigned to intake activities, will experience minimal change.

Looking forward, as part of the next phase of Social Assistance Renewal operating model co-design, the province and municipalities are working together to develop a new funding and accountability model that addresses administrative costs appropriately and re-invests any administrative savings in enhancing the system to best support clients. Once the details of these changes are known, Toronto Employment and Social Services will assess the impacts and engage with relevant stakeholders. Toronto Employment and Social Services will also continue to engage with the Ministry and municipal counterparts to learn more about their experiences with Centralized Intake.

Considering the timing and sequencing of these additional future changes related to Social Assistance Renewal and Centralized Intake, it is recommended that staff also report back in Q1 2023 on the next phase of Social Assistance Renewal, including timelines, roles and budget related to the shift towards the Provincial benefits

administration and program risk management. This report will also provide an update on the implementation of Centralized Intake in Toronto, including the centralization of Ontario Works phone applications and the implications for the City's Application and Support Centre and Human Services Integration initiative.

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SIGNATURE

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ATTACHMENTS

Attachment 1: Purpose and Key Features of Centralized Intake
Attachment 2: Toronto's Centralized Intake Prototype Model