



Learner income support policy manual

Policy guidance to Advanced Education staff, stakeholders, training providers and learners for study periods starting on or after August 1, 2021.

Learner income support policy manual

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Created by: Advanced Education, Foundational Learning Supports

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Overview and Effective Date

The Learner Income Support Policy Manual is intended to provide policy guidance to Alberta Advanced Education staff, stakeholders, training providers and learners.

Unless otherwise indicated, the policies and procedures described in this manual are effective for study periods starting on or after August 1, 2021. Learners with start dates prior to this will be subject to policies and procedures found in the Alberta Works Policy Manual.

The Government of Alberta, through Learner Income Support provides opportunities for Albertans to make successful transitions from school to work, unemployment to employment and from one career path to another.

This manual is divided into nine chapters to provide policy guidance for training providers and individuals wanting to attend full-time and part-time training.

Additional headings and links have been bolded to allow for quick referencing. Legislative authorities have also been listed for convenience. In the case of a conflict between the legislation and this document, the legislation prevails. This manual only applies to Learner Income Support policies.

The information provided in the Learner Income Support Policy Manual is subject to change. Please refer to the [academic upgrading and adult learning webpage](#) on Alberta.ca for the most up-to-date copy of this manual.

Chapter 1: Learner Income Support Eligibility

Albertans with Employment Insurance Eligibility and Training

Authority:

Income and Employment Supports Act

Income Support, Training and Health Benefits Regulation, Sections 39-46 and 97(1)(e)

Labour Market Development Agreement

The governments of Canada and Alberta together to provide employment and training programs and services for Albertans. The federal government, through the Employment Insurance (EI) Program, provides funding to the province under the LMDA to deliver programs and services for EI eligible clients.

Individuals who have worked enough insurable hours to establish an EI claim as determined by the Government of Canada will be treated as an EI client to determine Learner Income Support eligibility and funding amounts.

Acceptable Progress and Maximum Duration of Training

Authority:

Income Support, Training and Health Benefits Regulation, Sections 44(2-6), 57, 66 and 97(1)(h)

Advanced Education supports participation in training needed to allow an individual to progress towards further education or employment. All individuals in training are expected to maintain acceptable progress. A learner meets the requirements for acceptable progress if they:

- Pass all the courses in which they are enrolled as a full-time learner, and
- Demonstrate the essential competencies needed to successfully complete the program, to either:
 - Progress to the next level of training, or
 - Become employed.

In the event of an occurrence of unacceptable progress, the following interventions may be used:

- Change training program and/or training provider;
- Repeat one course;
- Move from full-time to part-time (Skills Investment Bursary) status

Learners can attend approved training full-time for up to 20 months in any one program stream:

- English as a Second Language
- Basic Skills (Grades 1-9)
- Academic Upgrading (Grades 10-12)
 - Academic Upgrading can be extended up to 30 months for eligible youth between 16 and 19 years of age to complete their high school diploma under the *Education Act*.
- Skills Development
 - Integrated Training
 - Occupational Training
 - Transitional Vocational Program
 - Integrated Foundational Pathways
 - Pre-Apprenticeship Training

Learners may receive up to 30 months when combining program streams.

Learners with low literacy or education level are allowed up to 40 months of funding when learning streams are combined.

Learners unable to attend training full-time due to a documented disability may be approved to take a reduced course load (minimum 40% of a full course load). These learners may access up to 50 months of training.

Part-time Training– Skills Investment Bursary is not considered for the purposes of calculating months of training benefits.

Duration Maximum

Once the maximum number of months has been accumulated, further funding will not be approved if it has been less than 48 months since the learner last attended training. Exceptions may be considered based on a determination of the learner's suitability for further training.

Counting Months of Training

All full-time Learner Income Support will count towards maximum duration. An individual must participate in one day of full-time training to be counted as a month of training. All full-time training sessions that an individual never attended are not applied to their duration entitlement. If the training session begins before the sixteenth day of the month, the month will be counted as a month of training benefits.

- If the training session begins on or after the sixteenth day of the month, the part month will not be counted as a month of training. Counting will start the following month.

Each subsequent month will count as a month of training. The final month of training is counted regardless of the day it falls within the month. For example, training that ends on the first of a month will count as a month of training.

To count training months for participants who conclude their training prior to the training session end date, the following rules will apply:

- If the individual completes training early, the training months will be counted using the date they were supposed to complete training. For example, if an individual completes an 8 month program early, 8 months of training will still be counted towards their duration.
- In the event that a participant withdraws or is terminated from a training session, the number of months they attended until they withdrew will be counted.

Learner Income Support Benefits

While attending a Foundational Learning approved training program, individuals may be eligible for learner income support and training benefits. Eligibility for learner income support is based on the household unit meeting the program and financial eligibility criteria.

Application Process

When completing the **Learner Income Support Application (full-time study)** the individual must ensure:

- Their application including a Training Provider Information form and all required supporting documentation is complete and submitted.
- The application is submitted six to eight weeks prior to the training start date. An application can be submitted a maximum of five months prior to the start date of training.
- In exceptional circumstances, an individual may apply for funding any time during the period of training, but must apply before the end of their training program. In these cases funding starts for the month that the application was received, not the start date of the program.
- Learners whose application is received after the last day of training are not eligible for funding.

Learners are strongly discouraged from starting training until their funding application has been processed and funding is secured.

Funding Decision Letter

When a Learner Income Support Application for Full-Time Study has been processed, a Funding Decision letter is mailed to the learner. This letter indicates:

- Amount of assistance that has been approved for Income Support and for training benefits,
- Monthly amount the learner will receive,
- Disbursement schedule,
- How the learner will receive their funding,
- Health Benefits Card information,
- Important information about learner responsibilities, and
- Notification of the right to appeal and the appeal process.

Full-Time Learner Eligibility Criteria

Authority:

Income and Employment Supports Act, sections 5, 6(3), 9 and 19

Income Supports, Training and Health Benefits Regulation, Sections 4-7, 12-17, and 29-46

Training Provider Regulation, Section 2(1)(b)

To be eligible for Income Support as a full-time learner, an individual must meet all of the following non-financial and financial eligibility criteria as outlined in the *Income and Employment Supports Act* and the *Income Supports, Training and Health Benefits Regulations*.

- An individual must have a need training to pursue further education or obtain and maintain sustainable employment.
- An individual must meet the financial eligibility criteria and be assessed as having a financial need.
- An individual must be enrolled in an approved training program.

Full-Time Learner

- Foundational Learning programs must be a minimum of 20 hours per week.
- Skills Development programs must be at least 25 hours per week.

An individual may take a minimum of 40% of a full course load when they have a documented chronic or permanent disability. An assessment by a medical or other professional that indicates the learner must reduce their course load is required with the application package, or change in circumstances form.

Age and Out of School

Learner Income Support is intended for adults who are at least 18 years of age and who have been out of the regular kindergarten-grade 12 school system for minimally 12 consecutive months.

The Age and Out of School requirements can be waived in specific situations:

- Waiving the Age and Out of School requirement for 16 to 19 year olds. There are three situations in which 16 to 19 year old youth, attending a full-time education program defined under the *Education Act*, may be eligible for Income Support as a Learner if they are:
 - Pregnant, or
 - Single with a dependent child (e.g. single parent), or
 - Married or in a cohabitating relationship.

If none of the above circumstances apply, special consideration may be granted if there is a significant breakdown in the learner's relationship with the learner's parents. The following documentation is required:

- A letter from the learner that outlines the family circumstances, and
- A letter from a third party professional (e.g. social worker, physician, psychologist, high school counsellor, etc.) confirming the circumstances.

Learners who are approved for special consideration will be treated as independent for all future applications.

- Waiving the Age and Out of School requirement for [Transitional Vocational Program](#).
 - Learners attending Transitional Vocational Program will be automatically waived.

Residency

Individuals must:

- Have an established Alberta address or an established address within the city of Lloydminster,
- Be in Alberta at the time of acceptance into the approved training program.

Citizenship

An individual must be a:

- Canadian citizen, or
- Permanent resident of Canada, or
- Protected person as determined by Immigration and Refugees Citizenship Canada who:
 - Has been given convention protected person status, and;
 - Has a valid Protected Person Status document, and;
 - Has a valid Study Permit that covers the individual's entire period of training.

A protected person must submit this documentation with their Income Support Application for Learners.

The dependent child (20 years of age or younger) of a protected person does not require a Study Permit if they are attending a program under the *Education Act* (K to 12). Post-secondary students require a Study Permit.

If a protected person claimant is given convention protected person status, the protected person is not required to apply for and receive their permanent resident status, or their new SIN before applying for Learner financial support.

The following are not eligible:

- Protected person Claimant
- Person who has arrived in Canada (as a visitor, a Minister's Permit Holder, or a person in Canada illegally) and seeks protected person status, or while waiting for the outcome of their hearing.
- Visitor
- Person who is lawfully in Canada for a temporary purpose, including:

- Temporary worker,
- Student, or
- Tourist.
- Temporary Resident Permits
- Person possessing a special permit issued by the Minister of Immigration that allows them to reside temporarily in Canada.

Social Insurance Number

An individual must have a valid SIN. An individual with a SIN beginning with 9 and is not a convention refugee is not eligible to be a learner. See [Sponsored Immigrants policy](#) for additional information.

Employment Status

An individual must be unemployed, or working on average less than 20 hours per weeks over the last 12 weeks and planning to remain employed while in training.

Individuals leaving employment to attend training must be approved through a Counsel to Leave Employment (CLE) assessment that is conducted by Community and Social Services.

- A CLE will only be considered for individuals living in communities that have an unemployment rate of less than 5%.

Training Duration

There are [limits to the number of months](#) that the Government of Alberta will provide income support and training benefits to an individual enrolled in training. Individuals must have sufficient time left within these limits to reach their employment goal or to obtain their academic prerequisites for further training.

Further Education and/or Labour Market Destined

An individual must:

- Have a clear, definable and realistic education or employment goal, and
- Understand that further education or employment is the primary outcome of their training, and
- Be committed to seeking employment at the conclusion of their training

Ready, Willing and Able

An individual must be ready, willing and able to attend training and adhere to the Attendance policy. A completed Training Provider Information form is confirmation that an individual meets this criterion. A history of withdrawals and/or no shows indicates the individual is not suitable for training. Any individual who withdrawals and/or is a no show for training twice within their Service Plan is not eligible for further funding for 12 months from the date of their second withdrawal. In addition, the following are not eligible:

- An individual who is incarcerated
- An individual who has been convicted of an offence and is unable to work because of the conditions of their sentence.

Chapter 2: Learner Income Support Benefits

Core Essential Benefit

Authority:

Income and Employment Supports Act, Section 5 and 7

Income Support, Training and Health Benefits (ISTHB) Regulation, Schedule 4, Sections 2(1-3), 5(1)

Schedules 1, 2, 3 and 4 and MO 109/2019

The Core Essential benefit ensures that learner households have access to essential goods and services. Rates are regulated and based on the composition of the learner household. The amounts cannot be exceeded by ministry staff or the Income and Employment Supports Appeal Panel.

The Core Essential benefit covers:

- Food (except for a household unit living in an approved home, a group home, a hospital or a nursing home),
- Clothing, including diapers,
- Household needs,
- Personal needs,
- Use of a telephone,
- Laundry,
- Basic transportation,

No additional benefit may be issued for an item covered by Core Essential Benefits unless specific provision is made elsewhere in *IESA* or the *ISTHB* Regulation.

A Child Supplement Allowance of up to \$205 per month is added to the Core Essential for each dependent of a Non-EI learner who is 18 or 19 years old, and who is attending school, as defined under the *Education Act*.

Core Essential benefits are pro-rated if the training program start date is after the 10th day of the month.

Monthly Core Essential Rates	
Household Composition	
Single Adult	\$536
Adult- 1 Child	\$920
Adult- 2 Children	\$990
Adult- 3 Children	\$1060
Adult- 4 Children	\$1,130
Adult- 5 Children	\$1,200
Adult- 6 Children	\$1,270
Childless Couple	\$851
Couple- 1 Child	\$1,235
Couple- 2 Children	\$1,305
Couple- 3 Children	\$1,375
Couple- 4 Children	\$1,445
Couple- 5 Children	\$1,515
Couple- 6 Children	\$1,585
Additional Children	\$100

Each Child 18-19 add	\$205
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18 and 19 year old dependents must be attending high school and is only available for Non-EI learners.

Parenting Agreement/Order

Where the learner is in compliance with a Parenting Agreement/Order that specifies the number of days that a child resides with the learner, core essential benefits are provided as follows:

- If the child resides in the learner’s home less than 14 days per month, a prorated core essential benefit, based on the actual number of days that the child is in the learner’s home, is issued;
- If the child resides in the learner’s home for 14 days or more per month, the full monthly core essential benefit is issued.

Core Shelter Benefit

Authority:

Income Support, Training and Health Benefits (ISTHB) Regulation, Sections 2(1), (2) and (4)

The Core Shelter benefit assists learner households with shelter costs. Different rates are provided for learners who reside in private housing, social housing, or with relatives and are based on the composition of the household. Rates cannot be exceeded by ministry staff or the Income and Employment Supports Appeal Panel.

No additional benefit may be issued for an item covered by Core Shelter unless specific provision is made elsewhere in IESA or the ISTHB Regulation.

Coverage provided by the Core Shelter benefit varies depending on the household composition and living arrangements of the learner household.

Monthly Core Shelter Benefit Rates			
	Core Shelter Rates		
Household Composition	Living With Relatives	Social Housing	Private Housing
Single Adult	\$103	\$120	\$330
Adult- 1 Child	\$103	\$212	\$558
Adult- 2 Children	\$103	\$260	\$578
Adult- 3 Children	\$103	\$317	\$599
Adult- 4 Children	\$103	\$377	\$619
Adult- 5 Children	\$103	\$437	\$640
Adult- 6 Children	\$103	\$496	\$660
Childless Couple	\$103	\$193	\$446
Couple- 1 Child	\$103	\$262	\$588
Couple- 2 Children	\$103	\$317	\$608
Couple- 3 Children	\$103	\$377	\$618

Couple- 4 Children	\$103	\$437	\$639
Couple- 5 Children	\$103	\$496	\$659
Couple- 6 Children	\$103	\$555	\$679
Additional Children	\$103	\$0	\$21
Each Child 18-19 add	\$0	\$0	\$0

The monthly Core Shelter rate when living with family is applied when an applicant is:

- Living with parent, step-parent, adoptive parent, grandparent, adult child or adult grandchild of the learner or learner's spouse/partner, and
- Name of the learner or spouse/partner is not on the tenancy agreement/mortgage

Social housing rates are regulated as outlined in the Core Shelter Payment Table in IESA. This includes housing unit operated and maintained by a housing authority established under the *Alberta Housing Act* and covers:

- Rent
- Heating fuel
- Utilities (not including power/electricity except when power/electricity is covered as part of the tenancy agreement)
- Damage deposit
- Actual power/electricity costs are provided to learners living in social housing if:
- Power/electricity is not covered as part of the tenancy agreement, and
- the Core Shelter for social housing plus the amount for power/electricity does not exceed the rate for private housing

Private housing includes an owned home, rented accommodation, shared rent, room and board, or sharing accommodation with relatives when the learner's name, or the name of the spouse/partner of the learner is on the tenancy agreement/mortgage.

The Core Shelter benefit covers:

- Rent
- Payments under a mortgage or agreement for sale
- Lot rental for a mobile home
- Utilities (except telephone and, if the household unit is living in social housing, electricity)
- Heating fuel
- Damage deposit
- Municipal taxes
- House or tenant insurance
- Condominium fees, if applicable
- Homeowner's maintenance

Core Shelter benefit may be pro-rated if the training program start date is after the tenth day of the month. A learner may receive full Core Shelter benefit if they can demonstrate their shelter costs have not been paid.

A learner must notify the ministry of changes to their household composition through a Change in Circumstances form for Learners. Examples include:

- Child out of parental home

- when a child is taken into the care of Child and Family Services and will be outside the parental home for more than three months, the Core Shelter is reduced in the second month
- Decrease or increase in household size. There is no overpayment for the first month if:
 - if an unforeseeable decrease occurs in the size of the learner household (e.g., a member of the household leaves home, is incarcerated or dies), or
 - if an 18 or 19 year old dependent ceases to be enrolled in a school governed under *the Education Act*.
- Shelter amount for a learner household may be increased three months before:
 - birth or adoption of a child, or
 - return of a child who has been in the care of Child and Family Services (or any other reason the child is returning home)
 - Deletion of Adult from File for Non-Compliance

If the Core Shelter is reduced because one adult is deleted from the learner household file for non-compliance, one month's notice is provided to a learner household.

Parenting Agreement/Order

If a Parenting Agreement/Order exists specifying that the child spends approximately fifty per cent of the time with the learner and the Parenting Agreement/Order is being followed, the child is included in the learner's household to determine the core shelter benefit rate.

- If both parents are learners and each has court ordered custody of approximately fifty per cent, each parent is eligible for the Core Shelter benefit.

Underpayments can be issued retroactively for all periods of assistance in which the underpayment occurred. Retroactive payments cannot predate the date the learner was initially deemed eligible for income support.

Benefits or income with a cents value are rounded down to the nearest dollar. For a full-time learner, payments will be made if the amount is greater than or equal to \$1.

Supplementary Benefits

Supplementary benefits are available to assist individuals with expenses that occur while they are in training. Continuous supplementary benefits are available from when the need is identified to the end of training. Non-Continuous benefits are intended to assist with one-time expenses that occur while training is ongoing.

Continuous Supplementary Benefits

The following continuous supplementary benefits can be automatically issued unless otherwise specified to learners and their household members when specific benefit eligibility criteria is met.

Additional Shelter Allowance

Authority:

Income Support, Training and Health Benefits Regulation, Schedule 4, section 8
Schedules 1, 2, 3 and 4

\$307 per month can be provided to a learner who is not living in social housing and meets one of the following conditions:

- There are six or more people in the learner household and no suitable accommodation can be found at core shelter rates. A copy of a lease agreement or mortgage documents and cost of a month's utilities must be provided.
- A member of the learner household is disabled and the accommodation has been physically adapted for that person's disability. Medical documentation of the disability, a copy of the lease agreement or mortgage documents and cost of a month's utilities must be provided.

- A member of the learner household would have physical or mental health endangered by a move, for the duration of the training period for full-time learners. Medical documentation substantiating the claim is required that also includes their opinion as to when the person's condition would improve so that they could move to cheaper accommodation. Utility receipts will be required if the rent or mortgage cost does not maximize the shelter allowance.

Child Care

Authority:

Income Support, Training and Health Benefits Regulation, Schedule 4, section 16
 Delegation of Minister's Authority to Directors/Staff Ministerial Order
 Schedules 1, 2, 3 and 4

Child care is provided to the learner and their spouse/partner for training, employment and health purposes. Child care can be extended to children older than 12 in exceptional circumstances such as special needs or medical conditions. Substantiation will be required.

An allowance covers the actual cost after subsidy or another source and will not be provided to individuals residing in the same household as the child. Costs may be provided to grandparents if they do not live in the child's home. Higher hourly rates may be approved if special circumstances exist. For example, the Learner or spouse/partner works shift-work or the Learner lives in a high cost community.

Daycare Rate	Actual cost less any subsidy received.
Grandparent/Relative Rate	\$154 per month per child
Licensed and Approved Child Care Programs	Actual cost after any subsidies
Lunch Programs	Actual Cost
Private Babysitting	Up to \$5.00 per hour for the 1 st child plus \$2.00 per hour for each additional child to a maximum of \$11.00 per hour.

Handicap Benefit

Authority:

Income Support, Training and Health Benefits Regulation, Schedule 4, section 2
 Schedules 1, 2, 3 and 4 and MO 109/2019

An individual may be eligible for the handicap benefit of \$179 per month when they or their spouse/partner has been determined by an Assured Income for the Severely Handicapped (AISH) Administrator or the Supervisor of an Alberta Supports Centre to have a severe handicap as defined under the AISH Regulation.

- For AISH clients applying for Learner Income Support, this benefit will be provided automatically. Individuals who have medical problems consistent with the AISH Regulation definition of a 'severe handicap' must request the Handicap benefit on a [Learner Income Support Application \(Full-Time Study\)](#) or a Change in Circumstances form.
- For Barriers to Full Employment (BFE) clients applying for Learner Income Support, verification must be provided indicating that they are currently in receipt of the Handicap Benefit (e.g. copy of most recent Income Support benefit stub).
- For individuals not previously in receipt of Income Support and the Handicap Benefit, a completed EMP 0207 Medical Information must be submitted to an Alberta Supports Centre for approval. The Government of

Alberta must give written approval for the Handicap Benefit for the individual to submit to Learner Income Support Office (LISO)

High Cost Community

Authority:

Income Support, Training and Health Benefits Regulation, Schedule 4, section 10
Schedules 1, 2, 3 and 4 and MO 109/2019

The ministry pays a high cost community allowance of \$307 per month, if the address on the Learner Income Support Application is located within the city limits of Fort McMurray, and is defined as private housing.

High School Incentive Benefit

Authority:

Income and Employment Supports Act, sections 5, 7 and 9
Income Support, Training and Health Benefits Regulation, section 24(2)(c)

The ministry may provide a High School Incentive benefit to a learner household in which a 16-19 year old parent who is attending the regular school system full-time and lives with their parent(s) who is also a learner.

The learner household is eligible for this benefit when:

- the 16-19 year old is attending the regular school system on a full-time basis;
- the 16-19 year old and their child(ren) must be dependants on their parent's learner file; and,
- the 16-19 year old must be the legal guardian of the child(ren)

Where the youth's parent is the legal guardian of the grandchild, the household is not eligible for this benefit.

The benefit rate is the difference between the Core Shelter and Core Essential benefits that the household would be eligible for if all members were considered as dependents, and the core benefits that the youth learner would be eligible for if an independent learner file was established.

Isolated Community Allowance

Authority:

Income Support, Training and Health Benefits Regulation, Schedule 4, section 9
Schedules 1, 2, 3 and 4 and MO 109/2019

The ministry may pay an isolated community allowance of \$41 per month for each member of a learner household if they reside in a permanent community that does not have all-weather road access. Members of the learner household including the learner must reside in the community, while attending training, in order to receive the benefit.

The eligible communities include:

- Fox Lake
- Tall Cree
- Fort Chipewyan
- Chipewyan Lake.

Child Supplement Allowance for Non-EI Learners

Authority:

Income Support, Training and Health Benefits Regulation, Schedule 4, Section 5
Schedules 1, 2, 3 and 4 and MO 109/2019

Every July, households with dependants receive a Canada Child Benefit Notice of Determination from the Canada Revenue Agency (CRA). Non-EI learners who are not eligible to receive the maximum Canada Child Benefit amount may be eligible to receive the Child Supplement Allowance. It will be issued if:

- The Non-EI learner is not receiving the full Canada Child Benefit amount due to no fault of their own.
- The Non-EI learner household is deemed ineligible for the full Canada Child Benefit amount due to immigration status.

The Child Supplement Allowance is issued to Learner households under the specific circumstances and duration as indicated below:

Child Supplement Allowance Circumstance	Duration
Persons in a marital separation/relationship breakdown who must wait 90 days to inform CRA.	Up to 3 Months
Families with a newborn who receive first CCB payment the month after birth.	Up to 3 Months
A household is late to file income taxes.	Up to 3 Months
A child returns from foster care and the family is late to notify CRA.	Up to 3 Months
Families with income from prior tax year that exceeds CCB qualifying thresholds must wait until the next year to reapply.	Up to 12 Months
Eligible Refugees who must meet an 18th month residency requirement to apply for the CCB.	Up to 18 Months

Child Supplement Allowance is not issued if:

- The Non-EI learner household has not processed a change of address or banking information with CRA.
- The Non-EI learner household has a missing or misdirected Canada Child Benefit cheque.
- The child is not in the Non-EI learner household on a full-time basis.
- The Non-EI learner household has failed to or refuses to file an Income Tax return or provide updated information to the CRA.
- The Non-EI learner owes funds to CRA. The Non-EI learner must be sent a letter requesting that they contact CRA as soon as possible in order to renegotiate the amount CRA is deducting.

Telephone and Transportation for Leaving Abusive Situations

Authority:

Income Support, Training and Health Benefits Regulation, Schedule 4, Section 20
Schedules 1, 2, 3 and 4 and MO 109/2019

The Personal Benefit – Telephone and Transportation – Leaving Abusive Situation is provided to a learner when they

or a member of their household unit has been abused. This benefit will allow them to access telephone and transportation services needed to secure their safety.

- Telephone: \$31.00 per month
- Transportation: \$62.00 per month

A household will receive this benefit for a period of six months with extensions provided as required, or until the end of the training period, whichever comes first.

The learner must submit either a [Learner Income Support Application \(Full-Time Study\)](#) or a Change in Circumstances form requesting the benefit, and substantiate their need by including:

- Statement of the learner or training provider's knowledge of the abuse, or
- Evidence from another professional source (e.g. physician, nurse practitioner, police, women's shelter).

Special Diets

Authority:

Income Support, Training and Health Benefits Regulation, Schedule 4, Section 21
 Delegation of Minister's Authority to Directors/Staff Ministerial Order
 Schedules 1, 2, 3 and 4 and MO 109/2019

Learners who require a special diet for health reasons are provided an allowance to cover the additional cost. Rates for special diets are not subject to appeal to an Income and Employment Supports Appeal Panel.

For special diets not shown in the benefit rate table, approval is required by the Executive Director, responsible for learners under IESA.

Special Diets	
Benefit	Monthly Amount
Breast Feeding	\$31
Celiac/Gluten Free	\$82
Diabetic or Heart Healthy	\$41
Hepatitis C	\$37
High Calcium	\$21
High Calorie	\$37
High Fibre	\$21
High Protein	\$21
HIV/AIDS or Hepatitis C	\$37

Infant Formula	\$205
Lactose Free	\$21
Low Cholesterol/Low Fat	\$21
Low or High Potassium	\$21
Low Sodium	\$21
Milk Free	\$52
Pregnancy	\$26
Renal Failure/Insufficiency	\$113
Other Special Diet	\$21 per month when approval is pending for diets not listed

The learner requests this benefit when they submit either a [Learner Income Support Application \(Full Time Study\)](#) or a Change in Circumstances for Learners form with an [Additional Continuous Benefits form](#) to the Learner Income Support Office (LISO).

Training Transportation

Authority:

Income Support, Training and Health Benefits Regulation, Schedule 4, section 7
Schedules 1, 2, 3 and 4 and MO 109/2019

The ministry may pay travel costs of \$0.13 per kilometer for a full-time learner to travel to an approved training program if the learner resides in a different community from the place of training and there is no public transportation between the communities.

The learner requests this benefit when they submit either a [Learner Income Support Application \(Full Time Study\)](#) or a Change in Circumstances for Learners form with an [Additional Continuous Benefits form](#) to the Learner Income Support Office (LISO).

Transportation to Day or Employment Programs

Authority:

Income Support, Training and Health Benefits Regulation, Schedule 4, section 15
Schedules 1, 2, 3 and 4 and MO 109/2019

The ministry may pay transportation costs for the spouse/partner of a learner who is designated a Barriers to Full Employment Income Support client and is attending a day or employment program. This benefit is in addition to assistance through the Employment Training and Transition Supports benefit.

The benefit will provide the actual cost of a bus pass, or \$0.13 per kilometer for a private vehicle or the actual cost of taxi fare or ticket to use a private bus company.

The learner requests this benefit when they submit either a [Learner Income Support Application \(Full Time Study\)](#) or a Change in Circumstances for Learners form.

Director Approval

Authority:

Income and Employment Supports Act, Sections 2 and 5(1)(c)
Income Support, Training and Health Benefits Regulation, Schedule 4, section 28
Delegation of Minister's Authority to Directors/Staff Ministerial Order

A Director Approval benefit may be issued if all of the following conditions are met:

- The need is not fully addressed in the Act or Regulations, and
- The need is not fully covered by policy, and
- The need is considered essential to the health, well-being or the move towards independence of the member of the learner household, and
- All non-departmental appeal avenues have been exhausted, and
- There are no other resources, and
- The least cost alternative is used.

Director Approval requests are considered on a case-by case basis at the amount of the lowest cost alternative. There is no maximum amount with this benefit.

Note: This does not apply to the authority of the Executive Director responsible for learners under the Income and Employment Supports Act for health benefits issued under Part 3 of the ISTHB Regulation, and for Special Diets (ISTHB Schedule 4, Section 21). To determine whether a benefit is a Health Benefit, or where authority comes from to make a specific decision, refer to the Authority Chart. These benefits are provided under the authority of the Minister and Appeal Panels have no authority to rule with respect to benefits issued under the authority of the Minister.

Information on health related benefits and services can be found at Tools and Resources – Health Benefits. The site includes Guidelines for Director Approval of Medical Procedures and Complementary Health Therapies.

The learner requests this benefit by submitting a Change in Circumstances form for Learners and outlining their specific need and the duration the additional support is required. Substantiation of the circumstance may be requested.

Note: The Income and Employment Supports Appeal Panel does not have the authority to alter the decision of the Director.

Emergency Benefits

Authority:

Income Support, Training and Health Benefits Regulation, Schedule 4, section 26
Delegation of Minister's Authority to Directors/Staff Ministerial Order
Schedules 1, 2, 3 and 4 and MO 109/2019

An emergency allowance may be provided for food, accommodation, replacement clothes, unpaid utility bills, repairs to home or major appliances, or other goods and services of an emergency nature when:

- The situation is beyond the control of the household unit, and
- The learner or a member of the household unit is in a situation that presents a serious health or safety risk, and
- The person cannot wait until the next payment date, access other available resources, or make alternative arrangements.

If a learner or a member of the learner's household has an emergency situation, the learner should contact the Learner Income Support Office (toll free at 1-800-222-6485, or in Edmonton at 780-427-3722. If outside working hours the learner should contact the Income Support Contact Centre (toll free at 1-866-644-5135, or in Edmonton at 780-644-5135).

Substantiation of the emergency circumstances may be requested. Examples include evidence from a reliable source that the item being requested is essential, or a statement indicating the balance of unpaid utility bills.

Rates for Eligible Emergency Situations

Emergency Benefits	
Accommodation	Actual cost of reasonable hotel, motel or shelter for up to one month, two weeks at a time.
Childcare	Actual Cost
Damage Deposit (without children) Can be issued once every three years	\$358
Damage Deposit (with children) Can be issued once every three years	\$1,021
Eviction Prevention Benefit (without children) Issued one time only without repayment	\$358
Eviction Prevention Benefit (with children) Issued one time only without repayment	\$1,021
Food (Non-Travel)	\$23 per adult per month \$15 per child per month
Food (Travel)	\$11 per adult per day \$6 per child per day
Home and major appliance repairs	Actual cost of essential repairs on a repayment basis only
Relocation Allowance	Actual Cost
Replacement Clothes (Adult)	\$219 per adult
Replacement Clothes (Child)	\$164 per child

Transportation	\$0.13 per kilometer
Utility Arrears	Actual Cost
Other Emergency Needs	Up to \$1,021 monthly

In addition to the emergency benefits listed, learners in an emergency situation may be issued child care and/or the Special Transportation and Travel Payment benefits if they meet the benefit eligibility criteria.

Health Benefits

Authority:

ISTHB Regulation, Part 3, section 73

ISTHB Regulation, Part 3, section 74

Health Benefits Exception Committee Ministerial Order, section 74

The ministry provides health benefits to eligible learners to ensure they have access to goods and services essential to health and well-being. Additional information on health benefits is available in the [Health Benefits General Policy](#).

Health Benefits Card Coverage

Eligible members of the learner household will receive their health benefits through a health benefits card. The health benefits card provides coverage from day training starts until the last day of the month that the learner completes or leaves training. If a learner has dependent children, they are automatically enrolled into the Alberta Child Health Benefit (ACHB) program and will receive an ACHB card.

Learners are expected to use their health benefit card to obtain eligible health goods or services.

Certain groups receiving health benefits from other sources are not eligible for Government of Alberta health benefits, even though in some cases they may be eligible for Learner financial benefits.

- Eligible for health benefits from the federal government
- Sponsored immigrants, unless determined to be eligible for income support as a learner.

Health benefits include:

- [Prescription/non-prescription drugs and nutritional products](#)
- [Optical services](#)
- [Dental services](#)
- [Ambulance services](#), and
- [Essential diabetic supplies](#)

Learners may submit an exception request to the [Health Benefits Exception Committee](#) (HBEC) for defined benefits not covered within the rules of the applicable agreements and drug lists. Decisions of the HBEC are final.

Supplementary Health Benefits

Other goods and services, which are health related may be provided as a Supplementary Health Benefit to learners eligible for income support. A learner requests this benefit through a Change in Circumstances form. Supplementary Health Benefits include:

- Continuous Positive Airway Pressure (CPAP) devices

Coverage is provided for CPAP devices for the treatment of moderate to severe Obstructive Sleep Apnea (OSA) when it is medically essential. A learner must have received this diagnosis through a Level 1 Sleep Study in a

sleep lab or clinic, which requires a referral from a physician. The Learner Income Support program does not provide funding for CPAP devices to treat mild OSA or funding to rent a CPAP device.

The Learner Income Support program may provide:

- Up to **\$1,736.00** for a fixed pressure CPAP device, or
- Up to **\$2,042.00** for an auto-pressure CPAP device.

The above prices include a CPAP device with a three year warranty, heated humidifier, hose, mask with headgear, chin strap (if needed), and 12 filters. Replacement CPAP devices may be considered if the warranty has expired and the client confirms that their CPAP device is no longer working. The Learner Income Support program does not cover the cost of CPAP device rentals or repairs.

- Hearing Aids Benefits

The [Alberta Aids to Daily Living \(AADL\) program](#) provides this benefit to eligible Albertans.

- Medical and Extraordinary Transportation

This benefit may be provided if a member of the learner's household unit has a severe health problem and needs regular access to health services paid for by Alberta Health (doctors, radiologists, lab technicians, physiotherapists, etc.). The person must use the nearest appropriate health service provider and travel by the most economical means of transportation available.

The verbal statement of the learner or the client may be requested to further substantiate their need for medical transportation by providing a letter from their physician or nurse practitioner outlining the need for medical treatment, the frequency of treatment and the duration of treatment.

Rate: For public transportation, a benefit equal to the actual cost of a bus pass, or

- If the person cannot use public transportation, a benefit equal to \$0.13 per kilometer for a private vehicle, or
- If the person cannot use public transportation and does not have access to a private vehicle, the actual cost of taxi fare.

Medical and Surgical Supplies

Learner Income Support provides essential medical and surgical supplies when a physician indicates the item is essential for the medical management of the learner household member's condition and:

- It is not available or normally covered through any other resource such as [Alberta Aids to Daily Living \(AADL\)](#), the [Residential Access Modification Program \(RAMP\)](#), [Family Supports for Children with Disabilities \(FSCD\)](#), hospital, clinic, therapist, community resource or agency and
- No lower-cost alternative can be accessed. Fixed rates have not been established for any medical and surgical supplies with the exception of wheelchair/scooter repairs and batteries. At least two written quotes should be obtained for any items costing \$1,000 or more.

Documentation from a physician indicating the item is essential for the medical management of the learner household member's condition is required. Coverage for all benefits under medical and surgical supplies must be pre-approved by Advanced Education. Reimbursements will not be provided unless the item was required in an emergency and approval was sought as soon as possible after the emergency.

Requests for Continuous Positive Airway Pressure (CPAP) Machines require more extensive substantiation for consideration.

Items covered by Learner Income Support must:

- Be a consumable (one-time use or disposable) product or supply with a total value of \$715.00 or less per month (e.g., Lifeline if client otherwise qualifies, allergy serum where not available through the pharmacy, skin testing materials, bandages) or

- Be a durable item (have a useful life of more than three months) and its cost must not exceed \$2,042.00 (e.g., IUD, humidifier, back supports, wrist brace).

Wheelchair/Scooter Repairs and Batteries

Learner Income Support covers the actual costs for repairs and batteries for privately owned wheelchairs and scooters up to the maximum rates (includes labour and shipping):

- Manual wheelchair repairs: \$450.00 per year
- Power wheelchair repairs: \$600.00 per year
- Scooter repairs: \$600.00 per year
- Batteries for power wheelchairs and scooters: \$600.00

Other resources must be used whenever possible. For example, short-term medical needs (six months or less) may be available through community resources and agencies (e.g., Red Cross, Easter Seal) that loan medical supplies, such as crutches, canes, walkers, wheelchairs, hospital beds and T.E.N.S. machines.

Alberta Aids to Daily Living (AADL) may cover benefits for Albertans who have a long-term disability (6 months or more), and chronic and severe conditions.

Note: The learner is responsible for contacting an AADL authorizer or their Regional Health Authority's Home Care Program to be assessed by an AADL authorizer. The authorizer will assess the learner's needs and eligibility for AADL medical equipment and/or supplies, and complete an AADL authorization form. If the request is approved, the learner presents the [health benefits card](#) to the vendor as proof of exemption from the AADL 25% co-pay.

AADL provides coverage only for items listed in their program manual. AADL does not have an appeal mechanism to request coverage for an item not listed in their manual, and does not replace lost or stolen equipment, or equipment damaged due to misuse.

AADL does have an appeal process to review requests outside their quantity and frequency limits for items that they normally cover e.g. incontinent supplies. If the AADL Quantity and Frequency Review Committee denies a request, consultation should occur with AADL to explore the reasons for denial and other alternatives before Advanced Education will provide the requested item.

For more information on coverage criteria please contact AADL at 780-427-0731 in Edmonton or toll free in Alberta at 310-0000, then 780-427-0731.

Family Supports for Children with Disabilities (FSCD) will assist children under the age of 18 with a diagnosed disability. FSCD can assist only with the cost of necessary equipment related to the child's disability. For more information please contact the FSCD Information line at 780-644-1636 or the nearest [local office](#) for more information.

Appeals

Medical and surgical supplies are provided under the authority of the Minister Income Support, Training and Health Benefits Regulation, Schedule 4, section 27 and appeal panels have no authority to rule with respect to them.

However, if the item requested does not meet all the policy or coverage criteria, **and** denial of this item would create a life-threatening situation or debilitating effect, Director Approval may be sought.

- Special Diets: Learners who require a special diet for health reasons are provided an allowance to cover the additional cost.

Non-Continuous Supplementary Benefits

Authority:

Income Support, Training and Health Benefits Regulation, Schedule 4

Non-continuous supplementary benefits are issued to Learners and their households to assist with additional needs not covered by core benefits. The learner requests these benefits when they submit either a Learner Income Support Application (Full Time Study) or a Change in Circumstances for Learners form with an Additional Continuous Benefits form to the Learner Income Support Office (LISO). Substantiation may be requested

A non-continuous supplementary benefit that was not authorized in advance by the ministry may be issued as a reimbursement when the expense was incurred:

- In an emergency situation, and
- Within training program dates, and
- Within the last six months.

A Change in Circumstances form for Learners including required documentation must be submitted within the training program dates.

Child Care Deposit and Registration Fee

Authority:

Income Support, Training and Health Benefits Regulation, Schedule 4, Section 16

A refundable child care deposit and/or a refundable or non-refundable registration fee is provided when:

- It is required by the licensed or approved child care program from all parents, and
- There are no other resources available.
- The first child care refundable deposit and/or refundable/non-refundable registration fee is not recovered but subsequent child care deposits and/or registration fees issued for the same child or children are subject to repayment.

Deposits and registration fees are not issued for private babysitting and a refunded deposit and/or registration fee is not treated as income.

The actual cost up to one month's full child care fees may be provided. This is the unsubsidized amount that the child care provider charges for the child care space.

The learner requests the benefit by submitting either an EMP 5569 Learner Income Support Application (Full Time Study) or a Change in Circumstances form for Learners with an Additional Continuous Benefits form to the Learner Income Support Office (LISO) requesting the benefit.

A written statement from the licensed or approved child care provider stating the amount of the refundable deposit and/or refundable/non-refundable registration fee must be submitted.

Damage Deposit

Authority:

Income Support, Training and Health Benefits Regulation, Schedule 4, Section 14(b)
Schedules 1, 2, 3 and 4 and MO 109/2019

The ministry may pay the cost of a damage deposit necessary to obtain accommodation if:

- A household is establishing a new residence in order to escape an abusive situation, regardless of the abused household member's relationship to the abuser; and
- Requires a damage deposit to obtain rental accommodation; and
- It has not been provided previously for the same place/time through Income Support as Expected To Work (ETW)/Barriers to Full Employment (BFE) client.

The learner household may receive the benefit as long as their relocation occurs during their period of training (e.g., a

learner may spend 30 days at a shelter and then three months with family or friends before securing their own accommodation). The amount must not exceed the maximum applicable Core Shelter Benefit.

Learners request this benefit by submitting a Change in Circumstances form, and provide substantiating documentation such as a copy of the lease agreement. Additional substantiation may be requested.

Employment Training and Transition Supports

Authority:

Income Support, Training and Health Benefits Regulation, Schedule 4, section 15
Schedules 1, 2, 3 and 4 and MO 109/2019

The ministry may pay up to \$511 per calendar year to assist with the costs of employment, training and transition supports required to:

- Purchase goods and services for job search activities or for participation in a training program
- Accept or maintain employment
- Attend Government of Alberta funded training.

Examples of eligible expenses include:

- Testing fees, exam fees, deposits and registration
- Work or school clothing not covered by the core essential benefit (e.g., work boots)
- Tools (only as required for work experience or employment)
- Vehicle expenses (maintenance, registration and insurance)
- Other goods or services that are essential for training or employment.

A learner requests this benefit through a Change in Circumstances form and include substantiation such as bills or receipts.

Escaping Abuse Benefit

Authority:

Income Support, Training and Health Benefits Regulation, Schedule 4, section 14(b)
Schedules 1, 2, 3 and 4 and MO 109/2019

This benefit provides a learner up to \$1,021 if they needs to move to escape abuse to themselves or another member of the household unit. This includes a person who is living:

- With their spouse or partner,
- With someone other than their spouse or partner (e.g., roommate), or
- Alone.

A learner who previously left an abusive situation may be eligible to receive the benefit, as long as the reason they are setting up a new household is because they left a former home due to abuse.

If the benefit has been issued before, the learner will be referred to a community resource to help break the cycle of abuse.

If the spouse/partner and/or other household members are escaping abuse from the learner, they are not eligible for this benefit. They must contact an Alberta Supports Centre to establish their own file.

A learner requests this benefit through a Change in Circumstances form. Substantiation may be requested.

Certificate Confirming Grounds to Terminate Tenancy

This certificate will allow the learner to break their lease without financial penalty. The learner will be referred to the Common Service Processing Centre to obtain this certificate.

To obtain a Certificate Confirming Grounds to Terminate Tenancy the learner will need a court order such as an emergency protection order, a Queen's Bench protection order or a restraining order. Alternatively, they can obtain a statement from a person in a professional capacity such as a police officer, social worker, physician, nurse, psychologist, or other appropriate individual outlined in the *Residential Tenancies Act*. For more information on how to obtain this certificate, any Albertan can be referred to www.saferspaces.alberta.ca or to the Common Service Processing Centre by calling 780-422-4080 or toll free at 310-0000 followed by the number.

Additional Information on [benefits available for Albertans fleeing abuse](#).

Funeral Benefits

Authority:

Income Support, Training and Health Benefits Regulation, Schedule 4, Section 25
Schedules 1, 2, 3 and 4 and MO 109/2019

Funeral services may be provided as per the [Agreement](#) with funeral homes in Alberta, if:

- A member of the learner household dies, and
- Financial resources are inadequate, and
- There are no other means to pay for the funeral cost

Funeral benefits are delivered by Common Service Delivery (CSD). Applications for funeral benefits are submitted by the funeral home to the Alberta Supports Contact Centre (ASCC) at CSD. Family or Estate Administrators should contact the funeral home to discuss the funeral benefit.

Funeral homes that contact IS worksites should be referred to:

- Phone: 780-638-4443 in Edmonton, or toll-free 1-855-638-4443 outside Edmonton
- Fax: 780-643-9228 in Edmonton, or toll-free 1-855-643-9228 outside Edmonton.

Original forms can be mailed to:

Funeral Benefits
Alberta Supports Contact Centre
4th floor, 10405 Jasper Avenue
Edmonton, Alberta
T5J 4R7

The Learner Income Support Office (LISO) does not determine eligibility or process funeral benefits.

Relocation Allowance

Authority:

Income Support, Training and Health Benefits Regulation, Schedule 4, section 13
Schedules 1, 2, 3 and 4 and MO 109/2019

The ministry may pay for actual moving costs of the learner household unit using the most economical and reasonable means, if:

- A residential move within Alberta or Canada is essential to accept full-time employment and the move occurs while the learner is on income support

- To escape a situation of abuse, regardless of the victim's relationship with the abuser
- A residential move is required to another province or territory where financial or social supports are available.

Costs of moving are restricted to actual costs of moving the affected household members and only these items:

- Household goods
- Appliances and furniture

Additional moving expenses may include:

- Reasonable hotel or motel costs and meals if essential to the move and the well-being of the family, especially the children
- Rental truck, gas, insurance, trailer deposits, and/or bus fare
- Professional moving company only if self-move is not possible
- Packing if a person is unable to pack due to medical reasons.
- The member of the learner household must use the most economical and reasonable means of moving and those who are able to move themselves are expected to do so.

When the cost of the move is more than the value of one month's benefits and the person reapplies for assistance in Alberta within 12 months of receiving this benefit, they will be required to repay all the moving costs issued.

Learners request this benefit through a Change in Circumstances form and include substantiation such as a written job confirmation from the employer. Additional substantiation may be requested.

Special Transportation and Travel Payment

Authority:

Income Support, Training and Health Benefits Regulation, Schedule 4, section 6
 Delegation of Minister's Authority to Directors/Staff Ministerial Order
 Schedules 1, 2, 3 and 4 MO 109/2019

The ministry may pay travel costs when a member of a learner household has to travel for the following reasons:

- To reach a place of safety
- To receive treatment (e.g., addictions, medical, etc.)
- To comply with Child Support Services requirements including DNA testing, or
- To make a mandatory appearance in criminal court proceedings within Alberta.

The benefit is issued only to the person required to travel. In a situation where another member of the household unit has to accompany that person because of that person's age or health, a benefit for the accompanying person is also issued (e.g., if a small child has to travel to the health service, only one adult may be given the benefit to accompany that child).

Expenses

The following expenses, based on the least cost alternative may be provided:

- Transportation
 - Actual cost of public transit, or
 - \$0.13 per kilometer for a private vehicle, or
 - Actual cost of taxi fare
- Accommodation
 - Actual cost of reasonable motel, hotel or shelter
- Food

- Members of the household unit are required to travel outside the community where they reside for more than 24 hours.
- Adult \$11 per day
- Child \$6 per day
- Child care
 - Actual cost of child care at established rates.

A learner requests this benefit through a Change in Circumstances form. Substantiation may be requested.

Utility Connection, Reconnection or Deposit

Authority:

Income Support, Training and Health Benefits Regulation, Schedule 2, section 1(1)v

Income Support, Training and Health Benefits Regulation, section 99(d)(i)

Income Support, Training and Health Benefits Regulation, Schedule 4, section 23

Schedules 1, 2, 3 and 4 MO 109/2019

The ministry will assist learner households with the connection, re-connection or deposit of specific utilities needed to establish and maintain a household.

Expenses

The following expenses can be considered:

- Utility connection
 - Actual costs may be issued to a learner household if connection charges are required to secure water, power and heat service
- Utility reconnection
 - Actual costs may be issued to learner household for utility reconnection when disconnection was due to late payment or arrears
 - Provided on a repayment basis only
- Utility deposits
 - Actual costs may be provided to a learner household if a deposit is required to secure water, power and/or heat service
 - Can only be considered when no other options are available. For example, paying installments to the utility company.
 - a learner household is eligible to receive a deposit once for each utility
 - The first deposit for each utility is not recovered, however subsequent utility deposits are provided on a repayment basis only.

This benefit must not have been paid previously through Income Support as an Expected to Work (ETW) / Barriers to Full Employment (BFE).

This benefit does not cover utility arrears, which are considered as an emergency benefit.

A learner requests this benefit through a Change in Circumstances form. Substantiation may be requested.

Training Benefits

Authority

Income and Employment Supports Act, Division 3

Learners may be eligible for training benefits to assist with the cost of attending an approved training program.

Training benefits include:

- Tuition costs
- Books
- Supplies
- Mandatory fees
- Student association fees.

Training providers provide training costs by completing the Training Provider Information form. The costs are as follows:

- Tuition – is a fee charged to learners in regards to instruction.
- Books – are essential to the successful completion of an approved training program. Examples include textbooks, book rentals, and photocopied materials.
- Supplies – are essential to the successful completion of an approved training program. Examples include binders, paper, pens, calculators, graphing calculator, printing costs, lab coats (purchase cost for one), uniforms (purchase cost for one), and internet fees. Does not include computer hardware.
- Mandatory fees – refers to flat-rate charges incurred by all the learners in an approved training program for libraries, technology, laboratories and any other facilities the use of which is necessary to both assist in instruction and program completion, but does not include tuition fees and fees for health and dental benefits.
- Student Association Fees – are payable to a students association for student association activities.

Training benefits are paid by the ministry on behalf of Learners to the training provider. Books and supplies are paid to either the learner or the training provider.

An individual's eligibility for training benefits will be determined with the submission of a completed Learner Income Support Application.

Asset Exemptions

Authority

Income Support, Training and Health Benefits Regulation, sections 1(1)(h), 1(3)(b)(ii), 47 and 49

Income Support, Training and Health Benefits Regulation, Schedule 1, section 2(1)

MO 109/2019 Schedules 1, 2, 3 and 4

MO 110/2019 Canada Workers Benefit

MO 104/2020 Canada Emergency Relief Benefit

MO 107/2020 Canada Emergency Student Benefit

MO 118/2020 Federal COVID-19 Recovery Benefits

Individuals are expected to contribute as much as possible financially to their training. However, certain types of assets are exempt. Learners who have non-exempt assets are not eligible to receive income support benefits.

Exempt Assets

- Asset Bought with Exempt Income
- An asset purchased with money received from the following is exempt:
 - Compensation for HIV infection through the blood supply
 - Financial benefits under the *Victims of Crime Act*, except amounts received for lost income
 - Hepatitis C Settlement Agreement, but not including:
 - a payment under section 4.02 of the Agreement for loss of income, or
 - a payment under section 6.01 of the Agreement for loss of support resulting from the death of the infected person.
- Japanese Canadian Redress Agreement
- Extraordinary Assistance Plan

- Common Experience Payments (CEPs) and Independent Assessment Process Payments (IAPs) under the Indian Residential Schools Settlement Agreement.
- Roth/Fifield Class Action Settlement Agreement from the Government of Alberta
- A Slave Lake Wildfire Relief Payment or a payment under the Emergency Accommodation Program to persons subject to the mandatory evacuation order issued by the Alberta Emergency Management Agency in May 2011.
- Compensation issued by the Government of Alberta pursuant to a Disaster Recovery Program for the June 2013 floods.
- Compensation issued by the Government of Alberta for damage or loss caused by a disaster as determined by the Government of Alberta.
- Compensation issued by the Government of Alberta pursuant to a Disaster Recovery Program for the April 2020 floods.
- Payments issued by a charitable organization for a disaster as determined by the Government of Alberta.
- A harm done compensation payment from the Government of Canada or a province of Canada exempted by the Minister under ISTHB Regulation, Schedule 2, Section 1(1)(x) as follows:
 - The Final Settlement Agreement for the Class Action of Raymond Michael Toth v. Her Majesty the Queen,
 - The Final Settlement Agreement for the Class Action of Ross, Roy and Satalic v. Her Majesty the Queen (also known as the LGBT Purge Settlement Agreement);
 - The Final Settlement Agreement for the Class Action of Garry Leslie Mclean, Roger Augustine, Claudette Commanda, Angela Elizabeth Simone Sampson, Margaret Anne Swan And Mariette Buckshot v. Her Majesty the Queen (also known as Federal Indian Day School Settlement);
 - The Sixties Scoop Settlement Agreement
- Money received from a Government of Canada or province of Canada payment exempted by the Minister under ISHTB Regulation, Schedule 2, Section 1(1)(y)
 - Canada Emergency Relief Benefit (CERB) payments made by the Government of Canada.
 - Canada Emergency Student Benefit (CESB) payments made by the Government of Canada
 - COVID-19 Federal Disability Payment
 - COVID-19 Federal COVID-19 Recovery Benefits payments
 - Alberta Hero's Fund payments
 - Alberta Self-Isolation payments
 - Alberta Critical Worker Benefit payments

Documentation may be required, such as an individual's written statement that includes:

- A description and value of the asset
- A declaration that the asset was purchased with exempt income.

Asset (Liquid and Purchased) Obtained with Exempt Income

An asset, liquid or purchased with money received from the following payment is exempt:

- A non-recurring payment received from a First Nation that is paid equally to each member on the First Nation's band list as follows:
 - An Agricultural Benefit Settlement Agreement payment
 - A Piikani Nation Grazing Leases Settlement payment
 - A Lubicon Lake Band No. 453 Treaty 8 Lands and Benefits Claim Settlement Agreement payment
 - A Blood Tribe Mismanagement of Assets Settlement payment
 - A Missanabie Cree First Nation Treaty Land Entitlement Settlement payment
- A payment made to a First Nation under an agreement with the Government of Canada for a specific land claim exempted by the Minister under ISTHB Regulation, Schedule 2, Section 1(1)(s)
- A harm done compensation payment from the Government of Canada or a province of Canada exempted by the Minister under ISTHB Regulation, Schedule 2, Section 1(1)(x)

- Money received from a Government of Canada or province of Canada payment exempted by the Minister under ISTHB Regulation, Schedule 2, Section 1(1)(y)
- Canada Emergency Relief Benefit payments from the Government of Canada.
- Canada Emergency Student Benefit payments from the Government of Canada.
- Compensation issued by the Government of Alberta pursuant to a Disaster Recovery Program for the April 2020 floods

In addition, the following are also considered exempt:

- Any asset held by a trustee in bankruptcy for any member of the learner household under the *Bankruptcy and Insolvency Act* (Canada) is exempt with no restrictions. Written documentation from an official source such as a trustee, lawyer, or bankruptcy documents must be submitted.
- Business and Farm assets are exempt for first time applicants. On subsequent applications, a business or farm would be considered a non-exempt asset.
- Business tools, including equipment needed for employment and supplies for farmers, are exempt for the first time applicants. On subsequent applications, this will be considered a non-exempt asset.
- Clothing, children's toys and common household goods are exempt with no restrictions.
- A home of any value in which the individual lives, including the home quarter section for farmers, is exempt.
- Necessary household furnishings and appliances of any value are exempt.
- Accumulated assets in a government operated or sponsored savings program such as the Learn\$ave pilot program operated in Calgary are exempt.
- A Locked-In Retirement Account (LIRA) is a registered account that holds pension money that has been transferred from a pension plan. Money held within a LIRA are exempt assets.
- Marketable commodities produced or purchased in mass quantity and intended for sale or resale (e.g., farm yield such as grain, poultry, cattle and hogs) are exempt for the first application. On subsequent applications, this will be considered non-exempt assets. Written documentation such as a current income tax assessment, District Agriculturalist's report, or current farm records may be requested. Eligibility for an exemption is determined on a case-by-case basis.

Money in Trust for a Child

- Money received on a child's behalf (not including funds intended for a child's maintenance), plus any interest or income earned by that money that becomes part of the trust, is exempt if the money:
 - Is placed in an inaccessible trust (i.e., a trust the parent, guardian or child cannot take money from) within 60 days of receipt, or within 60 days of applying for financial assistance, and
 - Cannot be withdrawn for the child's benefit.
- Money intended for a child's maintenance is not exempt as an asset even if the funds are placed in trust.
- Canada Pension Plan (CPP) Benefit for the Child of a Deceased Contributor and CPP Benefits for the Child of a Disabled Contributor are not exempt.
- Money left to a child in a will is not exempt income, but may qualify for exemption depending on the terms of the will, and is considered on a case-by-case basis. Written documentation may be requested from an official source such as a lawyer, public trustee, financial institution, or a copy of the will that indicates:
 - The money is not accessible
 - Source of the money (to determine whether it is intended for the education or maintenance of the child)
 - Date the money was placed in trust
 - Date the child can access the money.

Other Assets

Other assets, excluding a liquid asset may be exempt as per ISTHB Regulation, Schedule 1, Section 2(1)(p) and Section 3. The asset may be required to be disposed of within a specified time frame or used to secure a loan. Documentation may be required.

In addition, the following are exempt:

- All prepaid funeral expenses for any member of the household unit are exempt.
- Any real estate owned by a member of the learner household, other than the primary residence, is exempt for the first-time applicants. This includes:
 - property that they do not occupy as their principal residence (e.g. cottage, rental property), or
 - co-owned property that they do not occupy as their principal residence, and the other owner is not a member of the learner household.
- All Registered Disability Savings Plans are exempt.
- Vehicles, including a vehicle that is adapted to accommodate a disability, are exempt.

Partially Exempt Assets

The following assets are partially exempt. The amount above the exemption is used in the resource calculation when determining financial need (e.g. \$103,000 RRSP - \$100,000 exemption = \$3,000 used as a resource and deducted from income support benefits).

- Amounts received for academic or community achievement are exempt up to \$3,500.
- Life insurance policies with a cash surrender value of \$1,500 or less (for all members of the household) are exempt.
- All Registered Education Savings Plans (RESP) are exempt unless a learner is able to access their RESP for their training. The full amount that is accessible is used to determine the learner's award.
- The household unit's Registered Retirement Savings Plans (RRSP) are exempt to the combined total of \$100,000.

Documentation may be requested, such as written documentation from:

- A life insurance company stating the cash surrender value of all life insurance policies for the adult members of the learner household
- Financial institution stating the value of all RRSPs for each adult member of the household
- The payer for a scholarship or bursary.

Liquid Assets

Authority:

Income Support, Training and Health Benefits Regulation, sections 1(1)(p) and 48
MO 302/2018 Federal Child Benefit Amounts

A liquid asset test is used to determine eligibility. Allowable liquid assets for a learner household must be less than (3 x Monthly Core Benefits) + \$10,000.

Individuals who have more than the 'allowable liquid assets' are not eligible to receive income support benefits.

Monthly Core Benefits for a learner household =

Monthly Core Essential + Monthly Core Shelter + High School Incentive Benefit + Handicap Benefit

Monthly Core Benefits for a Non-EI learner include the federal child benefit amount.

Exceptions

- Transitional Vocational Program applicants: Allowed to have non-exempt assets and the liquid asset test is not applied.
- Sponsored Immigrant applicants: When the applicant is a sponsored immigrant and they are not being fully maintained by their sponsor, the adult members of the sponsor's household unit cannot have any non-exempt assets, unless the sponsor is in default and in the Director's opinion the sponsor has abandoned or abused the sponsored immigrant.

Liquid assets include:

- Cash on hand
- Cash in a financial institution or held by a third party that is available on demand to the individual
- Assets, other than exempt assets, that are readily convertible into cash (e.g., stocks, term deposits, bonds, Guaranteed Investment Certificates (GICs) and other securities)
- Income tax refunds

100% Exempt Income

Authority:

Income Support, Training and Health Benefits Regulation, sections 50(4)(a)(ii), (4)(a)(iii), and (4)(b)(i)

ISTHB Regulation, Schedule 2

MO 109/2019 Schedules 1, 2, 3 and 4

MO 110/2019 Canada Workers Benefit

MO 104/2020 Canada Emergency Relief Benefit

MO 107/2020 Canada Emergency Student Benefit

MO 118/2020 Federal COVID-19 Recovery Benefits

MO 100/2021 Alberta Hero's Fund

MO 103/2021 Alberta Self-Isolation Payments

MO105/2021 Alberta Critical Worker Benefit

Certain types of income are fully exempt to ensure learners may have some resources they can use to purchase items that are not available through Learner Income Support. Exempt income is not used in the determination of eligibility, or level of financial support.

The following types of income are exempt:

- All employment earnings of a full-time learner
- Payment received under Schedule A or B to the 1986–1990 Hepatitis C Settlement Agreement, but not including:
 - Payment under section 4.02 of the Agreement for loss of income, or
 - Payment under section 6.01 of the Agreement for loss of support resulting from the death of the infected person
- A payment received for the pre-1986 and post 1990 Hepatitis C Settlement Agreement
 - There is no method of distinguishing loss of income and loss of support payments made in this agreement, therefore the entire payment is exempt.
- Compensation received from the government of a province or territory of Canada for infection with the HIV virus through the blood supply
- Money received as compensation for loss or damage to property of a member of the household if the money is used to repair or replace the property within a reasonable time as determined by the ministry.
- A refunded damage deposit
 - Under a tenancy agreement, or
 - Paid in respect of a utility or telephone
- Moving allowance provided by a landlord on termination of a tenancy agreement.
- Payment received by a member of the household pursuant to an order for support of a child who is not a member of the household.
- The Canada Child Benefit under the *Income Tax Act* (Canada)
- The Universal Child Care Benefit received from the Government of Canada
- The Alberta Family Employment Tax Credit received from the Government of Alberta
- The Alberta Child Benefit received from the Government of Alberta

- The Canada Workers Benefit (formerly the Working Income Tax Benefit) received from the Government of Canada
- Goods and Services Tax credit received from the Government of Canada
- Money received from the Government of Alberta to assist a person with a disability in purchasing services that will enable the person to live in the community
- Money received from a management body under the *Alberta Housing Act* for the payment of utilities other than electricity
- Money received for home repairs or renovations under a program of the Government of Alberta or Canada
- Payment, refund or credit directly or indirectly from the Government of Canada or Alberta that is designed to protect consumers from high energy costs
- Payment received from the Direct to Tenant Rent Supplement Program,
- Grant or loan to start a business (excluding any amount received as Income Support) that is received from a federal or provincial government department or agency or from a non-profit organization
- Loan from a financial institution, except for government loans to post-secondary students which are not exempt
- Payment made under a Government of Alberta program for the maintenance costs of a person to whom a member of the household is providing care, or is responsible for providing care
- Payment of arrears of child support owed for a period of time that the individual was not receiving assistance, and paid to the individual through the Maintenance Enforcement Program
- Self-employment income earned while enrolled in, and resulting from, an approved self-employment training program
- Benefit paid under the *Victims of Crime Act* (excluding amounts received for lost income)
- Employment income or self-employment income earned by a dependent child who is attending school or during the summer break before attending school
- Payment under an agreement between a First Nation and Her Majesty in Right of Canada with respect to a Specific Claim (Surrender), only as determined by the Minister
- A payment of a non-recurring nature received from a First Nation that is paid equally to each member on the First Nation band list as follows:
 - An Agricultural Benefit Settlement Agreement payment
 - A Piikani Nation Grazing Leases Settlement payment
 - A Lubicon Lake Band No. 453 Treaty 8 Lands and Benefits Claim Settlement Agreement payment
 - A Blood Tribe Mismanagement of Assets Settlement payment
 - A Missanabie Cree First Nation Treaty Land Settlement payment
- Certain payments made by the Government of Canada or Government of Alberta
- Common Experience Payments (CEPs) and Independent Assessment Process Payments (IAPs) under the Indian Residential Schools Settlement Agreement are 100% exempt to the extent that they do not replace lost income, support or medical care that was provided by the Income Support program
- Roth/Fifield Class Action Settlement Agreement from the Government of Alberta
- A Slave Lake Wildfire Payment or payment under the Emergency Accommodation Program to persons subject to the mandatory evacuation order issued by the Alberta Emergency Management Agency in May 2011
- Registered Disability Savings Plan (RDSP) payments
- A payment made by the Government of Canada or Alberta for part-time training costs as follows:
 - Skills Investment Bursary (Government of Alberta)
- A payment made by the Government of Canada or Alberta for Disability Related Employment supports and/or services to assist Albertans with disabilities to access Government of Alberta funded full or part-time training programs and/or to obtain employment.

- Compensation issued by the Government of Alberta pursuant to a Disaster Recovery Program for the June 2013 floods.
- Payments issued by charitable organizations for the June 2013 floods
- Compensation issued by the Government of Alberta pursuant to a Disaster Recovery Program for the April 2020 floods
- Compensation issued by the Government of Alberta for damage or loss caused by a disaster as determined by the Government of Alberta
- Payments issued by a charitable organization for a disaster as determined by the Government of Alberta
- A payment received from Tsuut'ina First Nation as a result of the Final Calgary Ring-Road Agreement dated November 27, 2013 between the Tsuut'ina Nation and Her Majesty the Queen in right of Alberta and that is paid equally to each member on the Tsuut'ina First Nation band list
- Canada Emergency Relief Benefit payments by the Government of Canada
- Canada Emergency Student Benefit payments by the Government of Canada
- The Final Settlement Agreement for the Class Action of Raymond Michael Toth v. Her Majesty the Queen;
- The Final Settlement Agreement for the Class Action of Ross, Roy and Satalic v. Her Majesty the Queen (also known as the LGBT Purge Settlement Agreement);
- The Final Settlement Agreement for the Class Action of Garry Leslie Mclean, Roger Augustine, Claudette Commanda, Angela Elizabeth Simone Sampson, Margaret Anne Swan And Mariette Buckshot v. Her Majesty the Queen (also known as Federal Indian Day School Settlement);
- The Sixties Scoop Settlement Agreement
- The COVID-19 Federal Disability Payment
- Payments made by the Government of Canada under the COVID-19 Recovery Benefits
- Alberta Hero's Fund payments
- Alberta Self-Isolation payments
- Alberta Critical Worker Benefit payments

Individuals are required to disclose income from the above sources on their Learner Income Support Application (Full-Time Study).

Non-Exempt and Partially Exempt Income

Authority:

Income Support, Training and Health Benefits (ISTHB) Regulation, sections 50 (1), (3), (4), (6) and 99(a)-(b)
 ISTHB Regulation, Schedule 2, Section 1(1)(b), (p),(g), (u)
 Schedules 1, 2, 3 and 4 MO 109/2019

To be eligible as a full-time learner, an individual and their spouse/partner cannot have income (after all applicable exemptions have been given) that equals or exceeds their assessed needs over the funded period of study.

An individual and their spouse/partner, who are applying to attend training, must declare the total household income on their application.

The individual and their spouse/partner must complete the Learner Income Support Application (Full Time Study) and identify all forms of income. If the monthly income varies from the projection by more than \$75 (more or less), the change must be reported by submitting a Change in Circumstance for Learners form.

By the end of training, learners are responsible for ensuring that any variation is reconciled. The learner will:

- Be paid if the income was overestimated, or
- Be required to pay the Government of Alberta if income was underestimated

Learners are responsible for keeping all financial records so they can verify all income and expenses if selected for an audit, or otherwise required to do so.

Exempt Income

Certain types of income are fully or partially exempt to ensure that learners may have some resources they can use to purchase items that are not available through income support. They include:

- Aboriginal Funds (e.g., Band or AHRDA Funds)
 - The actual amount received is considered income.
 - There is no exemption for this income.
- Awaiting Funds
 - Learners awaiting funds from Workers' Compensation Board (WCB), injury damages or Canada Pension Plan, must sign a [Repayment Agreement](#) before the financial assessment is completed and any funds issued. Money received in these circumstances has no exemption applied.
 - There is no exemption for this income.
- Award or Prize (including scholarships or bursaries)
 - The amount received in recognition of outstanding academic or community achievement is considered as income less an exemption of \$3,500 per person per academic year.
- Child Support
 - The actual amount received for support of a child who is a member of the household is considered income with no exemption.
 - Child Support is defined by its source (i.e. payment by the other parent, an estate, Maintenance Enforcement Program or the courts) and the reason it is received (for the care of a child or adult) rather than the method of payment (e.g. cash, cheque, money order, goods, services, or other valuables).
- Amounts received for arrears of child support are 100% exempt if payments were:
 - Owed for a period of time that the learner was not receiving income support, and
 - Paid to the learner through the Maintenance Enforcement Program.
- Employment Insurance (EI) Benefits
 - The first \$100 of regular EI benefits received each month, or portion of a month, while the learner is attending training, is considered exempt income.
 - There is no exemption on EI benefits received by the spouse/partner of a learner.
 - Income received from EI benefits is based on the formula: Net EI Benefit = Gross Benefit minus Income Tax (according to standard deduction tables).
- Canada Recovery Benefits
 - The first \$100 of these benefits received by the learner is considered exempt.
 - Income received from EI benefits is based on the formula: Net EI Benefit = Gross Benefit minus Income Tax (according to standard deduction tables).

Gifts

- Non-recurring gifts under \$900 per calendar year per household member are exempt. Gifts include per capita disbursements (PCD) payments to First Nations members.

First Nations

- A payment of a non-recurring nature received from a First Nation this is paid equally to each member on the First Nation band list.
- This does not include a per capita distribution resulting from specific claims (surrenders).
- Payments under an agreement between a First Nation and Her Majesty in Right of Canada with respect to a Specific Claim (Surrender), as specifically approved from time to time by the Minister.

Income Deducted at Source to Repay Other Programs

- ISTHB Regulation, Section 50(3)(b)(ii) only applies to garnishee orders on employment income for the first month the garnishment is in effect. However, a learner's spouse/partner and/or a dependent child who is

living in the learner's household and not attending school may have other automatic deductions from income (e.g., buying back a portion of their pension, overpayments, etc.) from a source like:

- Employment Insurance
 - Workers Compensation
 - Canada Pension Plan
 - Quebec Pension Plan
- For one month only, the amount the learner's spouse/partner and/or dependent child actually receives from an income source is counted as income. After that month, the amount that is withheld is also counted as income received.
 - In subsequent months, the amount of income before automatic deduction is counted, whether the automatic deduction is lowered or not.

Other Income (including Orphan's Benefits)

- The actual amount received (usually on a monthly basis) is considered income.

Rental Property Income

- Gross rental income received from the learner's primary residence is 50% exempt.
- Gross rental income from a property that is not the learner's primary residence is not eligible for an exemption.
- The ministry will determine that a rental situation exists before applying rental property income.
- Situations may occur where a learner collects rent from roommates to forward a lump sum payment to a landlord and does not financially gain from the situation. In these cases, the money collected is not considered income and is not used in determining eligibility for Income Support because the learner does not have discretion to use the money for a purpose other than paying the roommates' portion of the rent.

Retroactive Canada Child Benefit Payment

- A Canada Child Benefit lump sum payment from the Canada Revenue Agency is 100% exempt.

Room and Board Income

- Gross income received from a room and board arrangement in the learner's primary residence is 75% exempt.

Employment Earnings

- Learner: All employment income earned by a learner is considered 100% exempt income.
- Spouse/Partner: The first \$230 per month of net employment income plus 25% of remaining net employment income is exempt.

Dependents

- For each dependent child in the learner household who is not attending school, the first \$350 per month of net employment income plus 25% of remaining net employment income is exempt.
- For each dependent child in the learner household who is attending school, 100% of net employment income is exempt.

Note: Net employment earnings is based on the formula: Net Pay=Gross Pay minus Income Tax (according to standard deduction tables), Employment Insurance (EI), Canada Pension Plan (CPP), and any deduction required by an employer as a condition of employment (e.g., company pension plan contributions, union dues).

Some employers add the legally required vacation pay to the worker's wages/salary. Others give the employee vacation with pay. In either case, vacation pay is employment income, and is eligible for the earnings exemption.

Earnings in Kind

- Any goods and services received as payment for employment or part of gross self-employment income are considered employment income.

Garnishee-Employment Income

- When a creditor garnishees a debtor's employment income, part of the income is withheld at source and paid to the creditor. The ministry allows the first payment on each garnishee as a deduction when calculating a Learner's spouse/partner and/or a dependent child's net employment income.
- The ministry will inform the learner that all other payments on the garnishee order will be counted as income received. The one-time deduction gives the learner's spouse/partner and/or dependent child who is living in the learner's household and not attending school, time to apply to the creditor to vary the garnishee order (i.e., reduce the amount withheld).
- This is separate from Income Deducted at Source to Repay Other Programs

Self-Employment Income: Home Business and Farm

All net self-employment income (including all income earned from a home-based business) is considered income with no exemption. The following exceptions apply:

- Home-Based Business – Child Care
 - Where the adult member of a household unit provides child care in their home, the first \$230 plus 25% of the remainder of monthly income is exempt.
- Home Based Business – Dependent Child
 - The first \$350 plus 25% of remaining income per month is exempted for each dependent child not attending school and operating a home based business.
 - Income is 100% exempt for each dependent child who is attending school and operating a home based
- Self-employed learners and spouse/partners are allowed to deduct specified expenses from gross self-employment income to calculate net self-employment income. These deductible self-employment expenses are detailed in the Expected to Work/Barriers to Full Employment Self-Employment Income policy. The [Net Self-Employment Income](#) form is available to help.

Spousal/Partner Support

Actual amount received is considered income. There is no exemption.

Windfall

- If, during the funded period of training, the learner or spouse/partner receives a windfall of any value (e.g., lottery or bingo winning), the total value of the windfall is considered income with no exemption.
- The learner must report changes by submitting a [Change in Circumstances form](#) as soon as possible after income is received.

Chapter 3: Determining Amount of Learner Income Support

Calculation of Monthly Income Support

Authority:

Income Support, Training and Health Benefits (ISTHB) Regulation, section 52
 ISTHB Regulation, Schedule 4, section 24
 Schedules 1, 2, 3 and 4 MO 109/2019

A Learner Income Support Application (Full Time Study) must be submitted to the ministry in order to determine eligibility for Learner Income Support. Applications that are incomplete or do not provide the required documentation in order to determine eligibility cannot be processed.

An individual will be sent a Request for Information letter requesting the necessary information in order to make a determination about eligibility. This delay in determining eligibility may also delay the payment of benefits.

- An individual must meet all program eligibility and financial eligibility criteria in order to be eligible for Learner Income Support. As part of the financial eligibility assessment, certain assets and income that an individual has may be either exempt or partially exempt.

To be eligible for Learner Income Support, an individual and their spouse/partner:

- Cannot have any non-exempt assets
- Must pass the Liquid Asset Test
- Cannot have income (after all applicable exemptions) that equals or exceeds their assessed needs over the funded period of study.
- Once eligibility has been established, the monthly amount of Learner Income Support is calculated. This amount is based on the needs and resources (after exemptions) of the household unit.
- The Learner Income Support amount is determined by subtracting the resources from the allowable Learner Income Support benefits and dividing over the length of the training period (i.e. number of months).
- Individuals will receive a Funding Decision letter, which indicates the amount of the benefit payment, payment disbursement details, appeal process and other important information.

Income Tax Deductions (EI learners)

- EI benefits are deemed taxable benefits and the Government of Alberta is responsible for withholding Income Tax at source. The ministry is responsible to calculate the tax amount and remit a payment to Canada Revenue Agency. This payment is over and above the EI learner's regular benefit amounts.
- Benefits paid to and on behalf of learners during a calendar year are reported on a T4A, with the exception of: handicap benefit, telephone and transportation - leaving abuse, escaping abuse, relocation allowance and residential addictions treatment benefit which will be reported on a T5007.

Bridge Funding for Expected To Work/Barriers to Full Employment Clients

- In some situations, bridge funding for an income support client designated as 'Expected to Work' (ETW) or 'Barriers to Full Employment' (BFE) is necessary. The individual will continue to receive IS as an ETW/BFE until learner funding is received.
- The individual will receive a top-up for Core Essential and Core Shelter benefits. The top-up will increase their benefits to the eligible learner amounts for the days within the first month of the client funding period where Learner Income Support has been approved, but for which ETW/BFE Income Support payments have already been received for the month.

Note: This amount will be determined by the ministry. The formula is:

$(\text{Learner IS rate} - \text{ETW/BFE rate}) \times (\text{last calendar date in month} - \text{client funding start date} + 1) / \text{calendar days in month}$.

Individuals must continue to report monthly until their funding as a learner commences. The Funding Decision letter identifies the commencement date of learner funding.

An individual who ceases to be a learner at the end of the funded period of training and still requires financial support must apply for income support as an ETW/BFE for subsequent months.

Learner Funding Commencement and Pro-Rating Benefits

- Learner funding for Core and Continuous benefits normally commences the day the program begins if the Income Support Application for Learners was processed by the Government of Alberta before the program start date.
- The following applies in the first month of a training program:
 - If the Client Funding Start date is on or before the 10th calendar day of the month, full month's Core benefits are provided.
 - If the Client Funding Start date is after the 10th calendar day of the month, the Core benefits are prorated from the Client Funding start date.
- Core Shelter benefits may be issued for the entire month if the Learner can demonstrate that their shelter costs are not paid.

Late Applications

- If the learner applies late, in the second or later months of the training program but before the last day of training, the benefits are calculated for the entire month in which the application is received by the ministry.

- A late application cannot be used to gain eligibility when they would otherwise not be eligible (i.e., 12 months out of school).

Partial Financial Eligibility

Some groups may have reduced financial eligibility and/or meet additional criteria. They include:

- Sponsored immigrants
- AISH recipients
- Two Attending
- Spouse/Partner Ineligible

Sponsored Immigrants

Authority:

Income Support, Training and Health Benefits Regulation, sections 29, 31, 32 and 54

The sponsor of an immigrant has an obligation to financially support that individual until the end of the sponsorship period as specified by Immigration, Refugees and Citizenship Canada.

Sponsored immigrants are eligible for training benefits only. Learner Income Support is not provided to a sponsored immigrant in training, unless a sponsorship breakdown has occurred and the breakdown has been verified.

First time applicants who have been a resident in Canada less than 10 years are required to provide one of the following documents with their IS application:

- IMM 5292 Confirmation of Permanent Residence
- IMM 1000 Record of Landing
- Permanent Resident Card
- Verification of Status (VOS)

When the ministry is made aware of a sponsorship breakdown, and the individual's eligibility for Learner Income Support will be determined through a verification process.

AISH Recipients as Learners

Authority:

Income Support, Training and Health Benefits Regulation, sections 35 and 55

Households with a member receiving income from Assured Income for the Severely Handicapped (AISH) cannot also receive Learner Income Support. They must choose between continuing to receive their AISH income and receiving Learner Income Support.

Individuals who choose to remain on AISH will only receive funding for:

- tuition
- student association fees
- mandatory fees
- books

They are not required to undergo further income and asset testing.

AISH recipients who choose to receive Learner Income Support will be assessed against the Learner income and asset criteria in order to determine full eligibility.

AISH recipients indicate their choice on their Learner Income Support Application for Full-Time Study.

It is important, before signing the application for full time study that the individual(s) have discussed their options with their AISH worker.

Registered Treaty Indian Learners Living On Reserve - Non-EI Learners

Authority:

Income Support, Training and Health Benefits Regulation, section 33

The Federal Government is responsible for providing living allowance for Non-EI learners who are Registered Indians under the *Indian Act* and are living on reserve or ordinarily resident on reserve. The ministry pays for tuition, mandatory fees, student association fees, books and supplies only.

First Nations individuals, who are not living on reserve or ordinarily resident on reserve, may be eligible for funding if they meet the program eligibility criteria. This includes band members who are receiving Income Support as 'Expected to Work' (ETW)/'Barriers to Full Employment' (BFE) directly from the Government of Alberta or under "off reserve service arrangements" between the Government of Alberta and a band.

Individuals will be assessed for tuition, prescribed fees, books and supplies only when:

- They have a Certificate of Indian Status (CIS) card (commonly referred to as "status card") with their registration number, and are;
- Living on reserve and attending school on reserve,
- Living on reserve and attending school off reserve, or
- Leaving a reserve for the primary purpose of accessing education or training.
- Learners who have Registered Status under the *Indian Act* and return to live on reserve during training will be reassessed for tuition, prescribed fees, books, and supplies from the date they move back to the reserve.
- This includes band members who are receiving Income Support as ETW or BFE directly from the Government of Alberta or under "off reserve service arrangements" between the Government of Alberta and a band.
- For Learner purposes, ordinarily resident on reserve includes individuals with Registered Status under the *Indian Act*.
 - Living on reserve and attending school on reserve,
 - Living on reserve and attending school off reserve, or
 - Leaving a reserve for the primary purpose of accessing education or training.
- An individual completes the Learner Income Support Application (Full Time Study). Upon receipt of the Funding Decision letter, the learner takes this letter to the Income Support Office on the reserve to be assessed for a learner living allowance.

Spouse/Partner Funded by Another Source

A Learner's spouse/ partner who is attending training and will be in receipt of funding from a source other than Advanced Education, is eligible to be part of the Learner Income Support household.

The funding received by the spouse/ partner is considered non-exempt income and is deducted dollar for dollar from the household budget.

Supplementary benefits that are specific to one individual are payable (in full) to the Advanced Education funded household member (e.g., special diet).

Training Benefits

Funding related to training is assessed separately for each individual (based on their actual training costs) with associated payments issued to the training provider or to the applicable household member.

Two Attending

Authority:

Income Support, Training and Health Benefits Regulation, sections 2, 3, 36, 37 and 51(6).

“Two Attending” refers to a situation where two adults, residing in the same household as spouses/cohabitating partners, both require financial assistance to attend full-time training. This includes circumstances where:

- Both household members apply for Learner Income Support to attend full-time training; and/or
- One household member applies for Learner Income Support and the other household member applies for post-secondary loan funding from Student Aid; or
- One household member applies for Learner Income Support and the other household member applies for funding from another source (excluding those who are self-funding).
- Spouses/partners that are self-funded are excluded from this policy and the household is not eligible.

Each individual is required to submit a separate funding application, documenting the total amount of expenses required by, and resources available to, the household unit as a whole.

Note: Funding applications submitted by each individual are assessed jointly by the Learner Income Support Office (LISO) and/or Student Aid as required.

Spouse/Partner Funded by the Government of Alberta

- Core and supplementary benefits are payable to the household and are divided equally between the learner and their spouse/partner, with 50% of the total issued to each.
- Supplementary benefits applicable to both household members are also divided equally, with 50% of the total issued to each individual (e.g., childcare expenses, damage deposit).
- Supplementary benefits that are specific to one individual are payable (in full) to the applicable household member (e.g., special diet).
- A Learner’s spouse, who is attending the Language Instruction for Newcomers to Canada (LINC) program, is eligible to receive Learner Income Support core and supplementary benefits as a member of a Learner household. Funding is issued directly to the Learner.

Spouse/Partner Ineligible**Authority:**

Income Support, Training and Health Benefits Regulation, sections 29 and 53

When a spouse/partner is deemed not eligible based on their residency, citizenship status or because they are the responsibility of another program their needs are not considered when determining Learner Income Support.

In these situations, their income and assets are considered to belong to the learner and used to determine eligibility. Any non-exempt income and assets of the ineligible spouse/partner will be applied to the learner.

In exceptional circumstances the Director may exempt the income and assets when the spouse/partner is not in Alberta. For example, a spouse/partner lives in a foreign country where laws do not permit money to be sent out of the country.

The following must be considered for spouse/partner eligibility:

- They must reside in Alberta (including the city of Lloydminster)
- They must be a:
 - Canadian citizen, or
 - permanent resident
 - temporary resident permit holder who has been approved for entry into Canada by the Government of Alberta,
 - refugee or refugee claimant, or
 - victim of human trafficking as determined by Citizenship and Immigration Canada.

In addition:

- When a learner has a spouse/partner who is sponsored see policy for Sponsored Immigrants.
- A spouse/partner who is a refugee is not eligible for benefits if they are receiving financial assistance from the Government of Canada.
- When a spouse/partner is receiving Assured Income for the Severely Handicapped please see the policy section for AISH Recipients as Learners to determine eligibility for benefits.
- When a spouse/partner is participating in a full-time education or training program that is not approved by the Director then the learner is not eligible to receive Learner Income Support.
- A learner is not eligible for Learner Income Support if they or their spouse/partner is receiving similar income support and/or training benefits under another income support program.
- Spouse/partners who are participating in the Fine Option Program may qualify for Learner Income Support if their participation does not prevent them from participating in a training program.

Involvement with the Justice System

Persons who are the responsibility of the criminal justice system are not eligible for Learner Income Support.

Ineligible persons include:

- Offenders in a provincial or federal correctional center.
- Persons who because of the condition of their sentence or release are unable to attend training and/or work.
- Persons who because of the condition of their sentence or release are unable to leave their residence in order to attend training and/or work, e.g. some individuals on "house arrest".
- Persons legally required to reside in a half-way house or Community Residential Centre.
- Persons on day parole from a federal correctional centre or Community Residential Centre.
- Persons required by a Temporary Absence to reside in a half-way house or Community Residential Centre.

Spouse/partners who are participating in the Fine Option Program may qualify for benefits if their participation does not prevent them from attending a training program, working, or seeking employment.

Payments

Payments for Learner Income Support are paid directly to the learner. Tuition, student association fees, and mandatory fees are sent to the training provider. Books and supplies can be sent to either the learner or the training provider.

Learners are eligible for the full month in which their training ends regardless of when the end date falls within the month.

Payment Methods

Learners can be paid using the following methods:

- Electronic Fund Transfer (EFT)
- Cheque
 - The preferred method of payment is by EFT, however Learners without a bank account can receive payment by cheque. All learners will receive their funds two banking days prior to the first of the month. A learner may change their payment method throughout their training program.

Payments for Learner Income Support are sent directly to the learner. Tuition and mandatory fees are sent to the training provider. Books and supplies can be sent to either the learner or the training provider.

EFT for Disbursement of funds

Banking information is provided by the learner with the Income Support Application for Learners by completing the Direct Deposit Registration for Learners schedule. A bank form is also acceptable (as bank verification) if it includes

the name of the client, the client bank account information and the bank stamp. A Direct Deposit form already on the file will be used for subsequent training periods unless the learner indicates the information needs to be changed. Out of province bank accounts are accepted.

If Advanced Education cannot send the payment as an EFT, a cheque will be issued to the learner and mailed to the address provided. Alternative options for may be considered.

Change in Circumstances

Authority:

Income and Employment Supports Act, Section 14(2)

Income Supports, Training and Health Benefits Regulation, Section 46

Learners must report changes in their circumstances by submitting a [Change in Circumstances for Learners](#). Failure to report these changes may result in an underpayment or an overpayment being calculated and the learner owing a debt to the Government of Alberta.

Learners must submit a Change in Circumstances form to the Learner Income Support Office (LISO) whenever there is a change in:

- Legal Name (learner or household member),
- Immigration Status,
- Address,
- Relationship or marital status,
- The number of dependants residing in the household,
- Child care arrangements,
- Monthly income that exceeds \$75 per month,
- Assets and savings (etc.) for all/any household members,
- Academic status (e.g., withdrawal from a training program, changing from full-time to part-time studies, etc.), and/or
- A spouse's attendance in training.

Learners are also required to submit a [Change in Circumstances for Learners](#) to request additional IS and benefits that were not included in their original Funding Decision letter such as:

- Funding for Child care expenses,
- Employment Training and Transition Supports,
- Special Diets,
- Additional Time to Complete a Program Session
 - Up to one additional month can be granted when there are circumstances beyond a learner's control and the extra time will assist with their successful completion. A revised [Training Provider Information form](#) must be submitted with the [Change in Circumstances for Learners](#).

Additional Time to Complete a Program Session

If a learner cannot complete their training session by the scheduled end date, they may be allowed up to one additional month to complete that training session.

Additional time to complete the training session may be considered when:

- Circumstances preventing the learner from completing their training session by the regular end date are beyond their control and

- Additional time will facilitate the learner's successful completion of the training session within one month (immediately after the regular end date of the training session).

Circumstances beyond the learner's control causing their absenteeism may be due to illness, bereavement or other issues. Additional time is not granted to a learner who is unable to complete their training session due to regular absenteeism.

A learner who requires additional time to complete a program session must submit a [Change in Circumstances form](#) and a revised [Training Provider Information form](#) to the Learner Income Support Office.

Defaulting Sponsor

Authority:

Income Support, Training and Health Benefits Regulation, section 31,32 and 92

Sponsors are required to meet the financial needs of individuals they have sponsored. The Government of Alberta may recover the cost of benefits paid on behalf of [sponsored immigrants](#) and their dependents where sponsorship defaults have occurred. The overpayment will be calculated based on the total benefits issued excluding training benefits.

If the Sponsored Immigrant (who is the learner) is part of the sponsor's household unit (spouse/partner), the assessed overpayment (automated liability case) is 50% of the benefits issued.

If the Sponsored Immigrant (who is the learner) is not part of the sponsor's household unit (spouse/partner), the assessed overpayment (automated liability case) is 100% of benefits issued.

Maintaining Financial Eligibility

Learners maintain eligibility by maintaining academic progress, maintaining acceptable attendance, complying with training provider rules, and maintaining full-time status. Learners must continue to meet enrolment requirements for full-time study. If a learner withdraws from courses so they are no longer attending full-time, their full-time funding is terminated.

Income support benefits are impacted by the following:

- Withdrawal
- Program extensions
- Switching training providers/programs – funding is terminated, as the learner is no longer attending the program that income support benefits were approved for. A new Income Support Application for Learners must be completed for the new training provider/program.

Outcomes/Performance Measures

Authority:

Income and Employment Supports Act, Section 26(b)

Training Provider Regulation, Section 4

Training Provider Regulation, Section 5

Performance information is collected to assist the ministry with planning and resource allocation. The ministry expects minimally 70% of foundational learners to have progressed to further training or be employed within 90 days of their program completion date.

Different performance standards for a training program may be established at the ministry's discretion.

To be considered employed, an individual must be working on average minimally 30 hours per week, including individuals that are self-employed.

Individuals receiving Assured Income for the Severely Handicapped (AISH) benefits must be:

- Working 15 to 29 hours per week or
- Have continuous part-time employment of 20-29 hours per week, and are receiving at least the minimum wage as defined in the Alberta Employment Standards Code.

Surveys that collect outcome data on former participants are conducted by a third party contracted agency at 90 days and one year intervals. Periodic or ad hoc evaluations may also be conducted.

Survey results, periodic and ad hoc evaluations or other government sources (research, audits and monitoring) are used to assess the performance of programs.

Program Compliance

Authority:

Income and Employment Supports Act, Part 3
Training Provider Regulation

Monitors and audits are conducted to ensure expectations as stated in the *Income and Employment Supports Act* and related regulations, policies and procedures are being followed.

The purpose of monitoring is to ensure the duties of training providers are being met and, if applicable to ensure compliance with the Post Audit Action Plan. Throughout the monitoring process, areas for improvement may be identified. A plan to resolve identified issues will be developed. In the event an issue cannot be resolved it will be escalated and a special audit may occur. Immediate action may be required depending on the severity of the issue.

Audits are a thorough examination to ensure the duties of training providers are being adhered to. All training providers will be audited at least once every five years. Ad hoc audits may be initiated as a result of the findings of monitors when more information is required. Audits will mainly focus on the following criteria:

- Ensuring the Training Provider Information form (EMP 5573) is issued only to individuals who have met the training provider's entrance requirements.
- Application of the training provider's attendance Policy.
- Recording and reporting processes regarding the training provider's attendance policy and the three consecutive weeks absence rule.
- Accurate and timely reporting of learners who never attended or have been withdrawn from training.
- Repayment of tuition fees for learners who never attended or withdrew and for payments that have been made in excess of the amount owing.
- Staff qualifications, instructor capability, and facility.
- Maintenance and security of applicable records

Additional criteria may be included when the ministry determines it is warranted.

Remedial action may be taken against a training provider when they are considered non-compliant with any corrective action that is required by identified timeframes. Examples of remedial action include the removal of program approval or a reduction of allocation amounts.

Post-Verification Reviews

Authority:

Income and Employment Supports Act, Parts 14 and 15

Post-payment verification reviews are conducted to ensure Learner Income Support is being issued to qualified individuals. All funding applications are subject to a post-payment verification review. A learner can undergo multiple post-payment verification reviews and reassessments that may cover more than one academic period.

If a Learner is contacted to verify information, they are responsible for providing complete and accurate information on their funding application and keeping all financial records so they can verify costs and expenses. False or misleading statements may result in the suspension of funding and/or prosecution.

Any individual may report suspected or alleged program abuse to be investigated.

Chapter 4: Learner Overpayments and Repayments

Overpayments and Debts

Authority:

Income and Employment Supports Act, section 16(1) and Part 6
Income Support, Training and Health Benefits Regulation, section 99
Recovery Regulation, section 1(1)

An overpayment is the amount assessed to be repaid to the department. It must:

- Not exceed the financial benefits issued for that period
- Not include medical benefits, unless the learner is not eligible for any benefits.

Learners who have an overpayment are first sent a letter requesting further information on their circumstances for consideration by the Director (or delegate). Learner overpayments that meet the criteria set out in the [Waiving of Overpayments policy](#) can be waived.

Should the learner not respond to this request, or the Director's decision is that repayment is required, learners must be informed in writing about the reason for their overpayment and their right to appeal within 30 days of being notified, with an additional 10 days to account for mailing time periods.

A debt is money owing to the Government of Alberta and occurs when a learner:

- Has not appealed an overpayment and the appeal period has elapsed;
- Has appealed an overpayment and the Income and Employment Supports Appeal Panel has upheld or varied the Government of Alberta's decision;
- Has appealed the overpayment and the appeal panel has determined the appeal as abandoned by the learner;
- Agrees to repay an amount through a repayment agreement ([EMP 0976B](#));
- Is issued a supplementary benefit on a repayment basis, or
- Is convicted of fraud.

Calculating an Overpayment

Based on a reassessment(s), if the difference between what the learner received and what they are eligible for is \$500 or greater, for the reassessed time period, an overpayment is calculated and the learner is notified. The overpayment amount must total \$500 or greater within an application period (normally 12 months).

Health Benefits are not included in the calculation of learner overpayment. The amount of the overpayment cannot exceed the amount issued to the learner.

If fraud is suspected, an overpayment must not be assessed or discussed with the learner until LISO has completed their investigation.

Overpayments will not be calculated for a period older than three years with the exception of fraud convictions resulting in a judgment or restitution order.

Once a learner has exhausted their right to appeal, an overpayment becomes a debt and is recoverable.

Waiving Overpayments

Authority:

Income and Employment Supports Act, section 35(4), (5)

Repayment of an overpayment is required and will not be waived in the following instances:

- The person received the benefit by fraud; or
- The person received the benefit by willful misrepresentation; or
- The overpayment is the result of a default sponsorship agreement, or
- The overpayment is the result of the learner withdrawing from training.

This policy does not apply in circumstances where the overpayment has crystallized into a debt.

The Director (or their delegate) has authority to waive a learner's requirement to repay an overpayment. Appropriate circumstances for the Director (or their delegate) to waive a learner's requirement to repay an overpayment are as follows:

Administrative Error

If an overpayment is wholly the result of an administrative error, it is generally waived from the requirement to repay. The following circumstances are not considered administrative error:

- The learner failed to fulfill the requirements of the program outlined in their signed declaration;
- The overpayment is the result of a combination of a worker/system error and the learner's failure to accurately declare their circumstance; or
- The overpayment was the result of an exceptional circumstance that affected a significant number of learners and waiving the requirement to repay all of the related overpayments would have a material financial impact on the program.

Other Circumstances

If an overpayment is not the result of an administrative error, the totality of the situation is considered when determining if an overpayment can be waived. Overpayments may be waived when the situation is outside the learner's control (e.g. medical). Substantiation may be required depending on the circumstances.

Note: The appeal panel has jurisdiction to rule upon the Director's (or their delegate's) decision to approve or deny a learner's requirement to repay an overpayment.

Duplicate Payments

If a payment is received by a Learner from both the LISA and Mobius payment systems for the same benefit(s) and period of assistance, an overpayment must be assessed on any duplicated amount.

When the client receives a duplicate Expected to Work/Barriers to Full Employment (ETW/BFE) and Learner payment the Alberta Supports office will be responsible for establishing the overpayment on the ETW/BFE payment.

Exception: When a Learner withdraws from training LISO will establish the overpayment.

When a Learner receives an ETW/BFE payment while waiting for their Learner application to be processed, and LISO did not use the payment as a resource, LISO will establish the overpayment. Any concerns will be addressed between the regional Income Support Specialist and the LISO Supervisor.

Recovery of Debts

Authority:

Income and Employment Supports Act, section 16 and Part 6
Income Support, Training and Health Benefits Regulation, section 99
Recovery Regulation, section 1(1)

Debts are collected as quickly as possible with the least administrative costs. The cost of recovering a debt should not exceed the amount of the debt. Once an overpayment has become a debt, it is recovered. All benefits issued subject to a repayment agreement are debts.

Underpayments

Underpayments occur when a learner applied for and was not issued a benefit they were entitled to, or, was issued a benefit amount less than the amount for which they were eligible.

A learner who applied for and was eligible for a benefit(s) in the past, but who did not receive the benefit(s), may be issued the benefit(s) while the learner is in training or for up to six months after the learner completes or withdraws from training. An underpayment incurred within an existing training period may be applied to reduce a current learner debt.

Debts Incurred While in Training

Learners who have incurred a debt while in training will have a deduction from their monthly learner income support benefit, commencing the next month in which learner income support is paid.

Recovery Rates

The recovery rate is the amount deducted from a learner's monthly benefits to repay a debt. The default recovery rates are:

- 1 adult in household: \$35.00
- 2 adults in household: \$65.00

Varying the Recovery Rate

The recovery rate may be decreased to a minimum of \$1.00 per month in exceptional situations where the recovery deduction is creating an undue hardship for the learner.

Payments at a higher rate may be put in place at the request of the learner, provided deductions do not exceed 10% of the household unit's Core Benefits.

The recovery process continues until the debt is paid in full or the learner completes or withdraws from training.

Outstanding Debts from Previous Training

Learners who incurred a debt during a previous training period where the amount of the debt was not paid in full during the training period, receive a letter indicating that Service Alberta has taken over the collection of the debt on behalf of the Government of Alberta, the amount of their outstanding balance and how to make payments on their debt. Learners are expected to repay their outstanding debt(s) in full.

Recoveries from a Defaulting Sponsor

Authority:

Income Support, Training and Health Benefits Regulation, sections 31, 32, and 92

Advanced Education may recover the cost of benefits paid to sponsored immigrants and their dependents where sponsorship defaults have occurred. The process to verify if a sponsorship default exists is outlined in [Sponsored Immigrants](#).

The overpayment amount is the total benefits issued excluding training benefits.

If the Sponsored Immigrant (who is the learner) is part of the sponsor's household unit (spouse/partner), the assessed overpayment is 50% of the benefits issued.

If the Sponsored Immigrant (who is the learner) is not part of the sponsor's household unit (spouse/partner), the assessed overpayment is 100% of benefits issued.

Advanced Education will first notify the defaulting sponsor of the overpayment and will outline:

- The amount of the overpayment;
- The period of the overpayment;
- The reason for the overpayment; and,

- The right to appeal.

Once the appeal period has elapsed or the appeal has been concluded by the Income and Employment Supports Appeal Panel, the defaulting sponsor will be notified in writing that the overpayment is now a debt owing to the Government of Alberta and that full (or partial) payment can be made at any Service Centre or by mailing payment directly to:

Service Alberta
Collections Unit
PO Box 11417
Edmonton AB T5J 3E4

Recoveries on Repayment Agreements

Authority:

Income and Employment Supports Act, section 16(2)

Income Support, Training and Health Benefits Regulation, section 99

A repayment agreement is a signed agreement in which the learner or a third party debtor (on an active or closed file) agrees to repay a debt owed to the Government. As the amount becomes a debt owing upon signing the agreement, learners must be informed of their right to appeal prior to signing a repayment agreement.

A repayment agreement is a signed agreement in which the learner or a third party debtor agrees to repay a debt owed to the Government of Alberta. Learners are informed of their right to appeal before signing a repayment agreement because the amount becomes a debt owing to the Government of Alberta once the repayment agreement has been signed by the learner.

If the amount of the repayable debt was not known at the time the learner signed the agreement, the learner still has the right to appeal the rate of repayment or the amount of the debt when the amount is determined.

Repayable benefits will not be issued until a repayment agreement has been signed.

When a supplementary benefit is issued through a repayment agreement, the Repayment Agreement ([EMP 0976B](#)) must be signed before the benefit is issued.

Repayable Benefits

The supplementary benefits that are issued on a repayment agreement are:

- Deposits (subsequent requests)
- Home repairs
- Reconnections of each utility
- Replacement glasses beyond the optical agreement
- Utility arrears (subsequent requests)
- Rental arrears (subsequent requests)

Recovery Rate

If a learner wishes to have a recovery rate other than the default recovery rate, the learner must submit a Change in Circumstances form.

Compromising Debts Owing to the Crown

Authority:

Treasury Board Directive 4/2014

Ministerial Order No. 306/2016

The Statutory Director of the Income and Employment Supports Act has the authority to compromise debts up to \$25,000.

The Assistant Deputy Minister has the authority to compromise debts between \$25,001 and \$75,000. Debts greater than \$75,000 may be compromised by the Minister of Advanced Education.

Chapter 5: Appeal Process

Authority:

Income and Employment Supports Act, sections 35, 36.1, 37, and 43-48

Income Support, Training and Health Benefits Regulation, sections 73-74, 92-94 and 97

Disability Related Employment Supports Review Committee Ministerial Order, Section 7

Right to Appeal

Authority:

Income and Employment Supports Act, sections 43-48

Income Support, Training and Health Benefits Regulation, sections 73-74, 93-94 and 97

Advanced Education is required to inform an individual when a decision is made that affects their eligibility, Learner Income Support, training benefits, and/or other benefits. Specifically, Advanced Education is required to:

- Provide details of the decision and rationale explaining why the decision was made;
- Advise the learner of their right to appeal the decision to the appeal panel within 30 days of receiving notice of the Department's decision;
- Explain the process involved in appealing a decision to the appeal panel;
- Inform the learner that they must initiate the appeal process by submitting a written Notice of Appeal to the Learner Income Support Office (LISO) or to the Appeals Secretariat;
- Explain that benefits under review and/or appeal are not issued pending the outcome of an appeal hearing;
- Advise an individual with eligibility for the same benefit(s) under another department and/or a non-government program, that they must pursue these alternate options, (including appeal), prior to initiating an appeal with the appeal panel.

The Learner Income Support Office (LISO) represents the ministry of Advanced Education and makes a decision regarding eligibility for assistance under [Part 2 of the *Income and Employment Supports Act \(IESA\)*](#), based on information contained in the Learner Income Support Application. After determining eligibility for assistance, LISO issues a Funding Decision letter to notify the individual of:

- The details of a decision (with supporting rationale) that affects eligibility for assistance under Part 2 of IESA;
- Their right to appeal this decision; and
- The appeal process and the 30-day time limit to appeal the decision to the appeal panel.

Informal Review

Individuals who do not agree with a decision regarding eligibility for assistance under Part 2 of *IESA*, are advised to contact LISO for clarification. A consultant at LISO can explain applicable sections of *IESA*, associated Regulations and policy used to make the original decision. The consultant may also discuss potential alternatives and other resources available to the individual.

LISO will attempt to resolve the situation (if possible) prior to an appeal being initiated with the appeal panel. If an individual is not satisfied with LISO's explanation, the individual has a right to appeal the Advanced Education's decision to the appeal panel.

Initiating the Appeal Process

To initiate the appeal process, an individual must submit a completed [EMP0547A Notice of Appeal](#) form, (or any type of written notice requesting an appeal), to LISO or to the Appeals Secretariat. This form can be obtained from LISO, the [Appeals Secretariat's website](#), or by contacting the office of the Appeals Secretariat directly.

When submitting a Notice of Appeal, the individual must identify the decision that is being appealed and the reason for the appeal. The written Notice of Appeal must be submitted to LISO or to the Appeals Secretariat within 30 days of first receiving notification of a decision and the right to appeal.

Extension to 30 Day Appeal Time Limit

The Minister's authority to grant an extension beyond the 30-day time limit to appeal a decision is delegated to the Appeals Secretariat.

In circumstances where a Notice of Appeal is filed after the 30-day time limit has expired, LISO is required to send an [EMP0003 Request for Appeal Extension](#) letter to the individual. The Request for Appeal Extension outlines how to request an extension to the 30-day time limit to appeal a decision.

Requests for an extension to appeal must be submitted in writing and must indicate the date that notice of the decision was received and the reason(s) why the Notice of Appeal could not be submitted within the 30-day time limit. Appeal extension requests must be forwarded to:

Appeals Secretariat
2nd Floor, Agronomy Centre
6903 116 Street
Edmonton, AB T6H 5Z2

The Appeals Secretariat may contact LISO to verify the nature of the decision under appeal, to clarify any information provided, as well as the timeframe and method in which the individual was notified of the decision.

An extension may be approved, if the Appeals Secretariat is satisfied that there are apparent grounds for appeal and reasonable grounds for extension.

The Appeals Secretariat will advise the individual and LISO whether an extension is granted. If granted, the appeal will proceed to the appeal panel for review and decision.

Under [IESA, section 45\(3\)](#), the Income and Employment Supports Appeal Panel has authority to hear an appeal submitted beyond the 30-day time limit, without involvement from the Appeals Secretariat, if the individual satisfies the appeal panel that:

- They did not receive notice of the Department's decision; or,
- Notice was received later than when it was deemed to have been received.

Income and Employment Supports Appeal Panel

An individual has the right to appeal to the appeal panel, if they disagree with a decision made by the Government of Alberta regarding eligibility for:

- Assistance under Part 2 of *IESA* that affects the amount or value of income support and benefits (including supplemental benefits), and/or training benefits; and,
- Employment and training benefits under Sections 4 and 5 of the Employment and Training Benefits for Persons with Disabilities Regulation (also known as Disability Related Supports).

The Income and Employment Supports Appeal Panel may hear appeals regarding Director decisions related to:

- Eligibility or continuing eligibility, for the amount or value of assistance under Part 2 of the Income and Employment Supports Act (*IESA*);
- An amount payable under *IESA*, section 35; and,
- Any other matter provided for in the Income Support, Training and Health Benefits (*ISTHB*) Regulation.

Some decisions of the Director are not subject to appeal to the Income and Employment Supports Appeal Panel. These exceptions are identified in *IESA*, section 44 and *ISTHB* Regulation, section 97.

Powers given to the Minister under *IESA* and associated Regulations are not within the jurisdiction of the appeal panel to rule upon. While Advanced Education cannot deny an individual the right to appeal a matter that is under the discretion of the Minister, the jurisdiction of the appeal panel is limited to decisions of the Director only.

Health Benefits Exception Committee

Requests for coverage of a specific health benefit that is generally not provided may be made to the Health Benefits Exception Committee (HBEC). The HBEC ensures that individuals have access to health benefits required to meet their unique medical needs when conventional treatments and goods or services that are normally covered, prove to be inappropriate or ineffective. The HBEC process ensures that decisions are equitable and meet the parameters established by legislation, the Government of Alberta agreements with professional associations, Drug Benefit Lists and medical best evidence.

Decisions related to the provision of Disability Related Employment Supports (DRES) must be appealed to the Disability Related Employment Supports Review Committee (DRESRC). DRESRC reviews a decision to ensure that it is equitable and that it meets the parameters established by legislation. Committee members are government employees appointed by the Minister.

The authority for HBEC and DRESRC to review matters relating to Health Benefits and DRES is provided under ISTHB Regulation, Section 97 and the DRESRC Ministerial Order, respectively. A ruling made by members of HBEC and DRESRC is final.

Review of Decision – Training Eligibility

An individual has the right to request a Review of Decision if they disagree with a decision that impacts eligibility to attend Advanced Education funded training. A Review of Decision is conducted by different sources depending on who made the decision related to training eligibility.

- Decisions made by an authorized Training Provider: conduct a Review of Decision related to training eligibility through an Internal Training Provider Review Process.
- Decisions made by a contracted assessment agency: conduct a Review of Decision when an assessment that impacts eligibility to attend a training provider, is being disputed. The Review of Decision completed by a Contracted Assessment and Case Management Centre is final.

Income and Employment Supports Appeal Panel

Authority:

Income and Employment Supports Act, sections 43-48

Income Support, Training and Health Benefits Regulation, sections 93-95, 97

Appeal Panels:

- Are under the auspices of the Appeals Secretariat
- Are made up of citizens at large
- Are appointed by the Ministers of Advanced Education and Labour and Immigration
- Are located in Edmonton and Calgary
- Are independent quasi-judicial bodies

Have the authority to:

- hear evidence from parties to an appeal
- uphold, reverse or vary a decision under appeal

An appeal hearing is a quasi-judicial process where parties to an appeal have equal opportunity to present their case. It is also a forum for all parties to hear, to access and to challenge the validity of any or all information presented. By law, the appeal panel members must ensure that information presented at an appeal hearing remains confidential.

Documentation to be presented at an appeal hearing by Advanced Education will be made available to the individual at least seven days prior to the scheduled hearing date. If the hearing date is scheduled with less notice, the documents will be provided to the individual as soon as possible.

Any new information must be shared between the parties in advanced of the hearing, otherwise an adjournment of the hearing may occur.

Appeal Panel Hearings

After Advanced Education presents its information, the individual initiating the appeal and members of the appeal panel have an opportunity to ask questions.

The Individual:

- Is given the opportunity to provide information relevant to his/her appeal either verbally or in writing
- Should not withhold any relevant information

The individual will then present their information, and Advanced Education and members of the appeal panel have an opportunity to ask questions.

The person chairing the appeal hearing will then ask if the individual or Advanced Education has any additional information to present.

The individual and Advanced Education then make a final statement.

Adjournments may be requested if new information is presented at the appeal hearing that has not been previously reviewed and are until a specific date agreed upon by all participants.

If the individual does not attend a scheduled appeal hearing and has not notified the appeal panel in advance, the appeal panel may:

- Proceed with the appeal hearing and make a decision in the individual's absence; or,
- Choose not to proceed with the appeal hearing and reschedule another hearing date.

If the individual:

- Reschedules another hearing date with the Appeals Secretariat and does not attend the hearing for a second time; or,
- Has not contacted the Appeals Secretariat and fails to appear at the rescheduled hearing:
 - Advanced Education may request that the appeal panel proceed with the appeal hearing and make a decision in the individual's absence; or
 - Advanced Education may request that the appeal panel consider the appeal to be abandoned and confirm the original decision.

If an individual does not attend a scheduled appeal hearing for a third time, the following may occur. Upon Advanced Education's request, the appeal panel will likely issue a decision in the individual's absence; which includes declaring the appeal to be abandoned and confirming the original decision. In this instance, the appeal panel would render a Panel Decision to the individual advising that their appeal has been declared abandoned.

In situations where the appeal concerns an assessed overpayment, the appeal process must be concluded before Advanced Education can proceed with collecting on a debt.

Appeal Panel Decisions

After the hearing, the Income and Employment Supports Appeal Panel prepares and issues a Panel Decision on the matter under appeal. They may confirm, reverse, or vary (change) the decision under appeal.

If the appeal panel reverses/varies the original decision:

- An itemized list of the specific benefits, goods and/or services awarded to the individual is recorded
- Any restrictions pertaining to cost, frequency, time limitations (etc.) are also recorded
- Prepares the Appeal Report, including:
 - Facts or evidence on which the appeal panel based its ruling, as presented by the individual initiating the appeal, witnesses who attended the hearing, and the representative from Advanced Education.
 - Justification for the decision

Authority for the decision by citing the appropriate section of the Act or Regulations:

- Sends the Appeal Report to Advanced Education and the individual (usually within 10 business days of the appeal panel hearing date).

The Learner Income Support Office (Representing the Department):

- Schedules payment of benefits, if the appeal panel reverses or varies the Department's original decision
- Updates Mobius Notes, and
- Ensures that all documents referred to at an appeal hearing, either by the Department or individual, are placed on the individual's record.

Challenging Appeal Panel Decisions

In most circumstances, the appeal panel's ruling on a decision under appeal, is final. However, if the individual is not satisfied with appeal panel's ruling, they may ask the Ombudsman's Office to review the process used by the appeal panel to make its decision or request a ruling from Court of Queen's Bench by filing a Judicial Review of the decision.

Note: If Advanced Education believes that the appeal panel has exceeded its authority, they may present the matter to, and request a ruling from, Court of Queen's Bench by filing a Judicial Review of the decision.

Recovery of benefits authorized by the appeal panel will occur if Court of Queen's Bench quashes or sets aside the panel decision.

Benefits authorized by the appeal panel must be issued to the individual, pending outcome of the Department's challenge of the appeal panel's decision.

Chapter 6: Skills Investment Bursary (Part-Time Training)

Overview

Authority:

Income and Employment Supports Act, Division 3, Section 10
Income Supports, Training and Health Benefits Regulation, Part 2
Training Provider Regulation, Section 2

The Skills Investment Bursary (SIB) is available to Albertans wanting to access part-time training to move into further training or employment. The maximum amount issued is \$5,000 per calendar year.

An individual must be accepted by the training provider in an approved training program and funds allocated to the program. They are also planning on completing less than 60% of a full-time course load.

The Learner is eligible for the following training benefits while attending Part Time training:

- Tuition, mandatory fees and student association fees;

- Books and supplies;
- Installation and monthly fees for a basic internet package, if the individual does not already have internet access and it is required for their training;
- Transportation costs to attend this training; and,
- Child care costs

Eligibility Criteria

An individual is eligible to receive the SIB if they meet the following eligibility criteria:

- Have a need for training and be ready, willing and able to attend training, as determined by the training provider, based on their admission requirements.
- Be at least 18 years of age and not have attended an education program recognized under Alberta's *Education Act* or similar institution for 12 consecutive months. This requirement may be waived at the discretion of the Director.
- Have an established Alberta address including within the city of Lloydminster and be in Alberta at the time of acceptable into the training program.
- Be either a Canadian citizen, a permanent resident of Canada, or protected person as defined in the *Immigration and Refugee Protection Act (Canada)*.
- Have a valid Canadian Social Insurance Number (SIN). Individuals with questions about applying for a SIN may contact Service Canada at 1-800-206-7218.
- An individual is not eligible if they are incarcerated due to being charged with or convicted of an offence, or are unable to work because of a condition of their sentence or release.

In addition,

- An individual must not have a similar benefit through another program or have been approved for a student loan for the same program or course they have applied for.
- Assured Income Support for the Severely Handicapped (AISH) recipients are considered to be financially eligible without further review of their financial circumstances.
- Expected to Work (EWT), Barriers to Full Employment (BFE) and full-time learners are automatically considered to be eligible without further review of their financial circumstances.
 - ETW/BFE clients must request child care expenses through their Support and Financial Services Coordinator and notify them prior to applying or attending part-time training.
- An individual (and their spouse/partner) must not have combined net incomes (from line 236 of the current tax return) that exceed the yearly income threshold levels as outlined below:

Household Unit Size	1	2	3	4	5	6
Net income	35,000	40,000	45,000	50,000	55,000	60,000

- For each additional child add \$5,000.
- Non-taxable child support payments received by the individual and their spouse/partner in the preceding tax year, are included in the calculation.
- The allowable limit of Registered Retirement Savings Plans (RRSPs) purchased before studies commenced, with a total combined value owned by the learner and/or spouse/partner up to \$100,000.
- The individual and their spouse/partner cannot have combined liquid assets that exceed \$5,000. Liquid assets include savings and cash assets or convertible assets such as stocks, bonds, Guaranteed Investment Certificates (GICs), term deposits, and securities.

Ongoing Eligibility Requirements

- Learners may be asked to take part in information verification activities which are initiated by the Government of Alberta. In such cases, learners would be required to provide receipts for authorized expenses. If receipts cannot be produced, repayment of expenses may be required by the learner.
- Learners are required to make acceptable progress by passing all of the training provider's course requirements within the time specified and comply with the training provider's rules.
- If working, continue to work full-time or part-time while in training.
- Individuals need to report changes to personal information by submitting a Change In Circumstances form to the Learner Income Support Office. Changes include but are not limited to: name, phone number, address, variance in assets or income, change in academic status, etc.
- Employment Insurance (EI) recipients should consult with Economic Social Development Canada about collecting EI benefits while attending part-time training.

Taxation

Funding received through the SIB is taxable. In February of each year, T4As are issued for all learners who received a bursary in excess of \$500 during the previous tax year. The T4A will be mailed to the learner's last known address.

When a part-time learner is being withdrawn from training, the training provider must notify the ministry of the withdrawal.

Applying for the Skills Investment Bursary

An individual must complete and sign a Skills Investment Bursary Application for Part-Time Study form (EMP5571) and have their training provider complete the Training Provider Information form. Applications and forms can be completed online or downloaded from the above link and submitted to the Learner Income Support Office (LISO) in paper form.

A learner who submits an application for funding after the course is completed is deemed ineligible and the application will not be processed.

If the learner is enrolled in more than one course, and there is a gap of 30 days or more between the end date of one course and the start date of the next course, a separate application must be submitted for each course.

Forms

- [Online Skills Investment Bursary Application for Part-Time Study](#)
- [Skills Investment Bursary Application for Part-Time Study \(EMP5571\)](#)
- [Training Provider Information form](#)

Chapter 7: Approved Training Programs

Authority:

Income and Employment Supports Act, Part 3 Section 20
Training Provider Regulation, Section 2

Skills Development

Overview

Skills development programs provides full-time occupationally focused training opportunities enabling individuals to get a job and substantially improve their employment situation or adapt to changing labour market conditions or gain skills to sustain employment. All skills development programs can be delivered by classroom or synchronous e-learning.

Program elements include:

- Integrated Training – skills-based training that combines academic and general employability skills with occupation-related skills.
- Occupational Training less than 12 weeks – training that is occupation-specific that leads to a specific credential. It is minimally 25 hours per week.
- Transitional Vocational Program – training and work experience to assist learners with a developmental disability to obtain and maintain employment and gain independence.
- Integrated Foundational Pathways – a unique blend of essential skills, academics and applied skills development allows Albertans to build on their foundational competencies while preparing learners for further training and/or employment.
- Pre-Apprenticeship – help learners prepare to enter an apprenticeship program or find entry-level employment at the end of their training.

Integrated Training

Preamble

Integrated Training is a program element under Skills Development. It is a competency-based occupation-related training program intended to provide unemployed or marginally employed adult Albertans with a unique blend of occupation-related skills, work experience placement(s), employability and/or essential skills and applied academics and/or English as a Second Language (ESL). Integrated Training is based on the assumption that learning is more effective and meaningful when individuals can see the connection between various parts of their training program and apply their learning to real-work situations.

Intent

Integrated Training programs will:

- Provide individuals with applied/hands-on learning experiences including one or more work experience placements, so that learning becomes more meaningful and relevant to them,
- Support the acquisition of competencies (knowledge, skills and behaviors),
- Forge close linkages between training providers and employers,
- Build a common understanding about the specific skills, knowledge and behaviors that individuals will master as a result of their learning experiences, and
- Address local labour market demand for skills training.

Policy

The following components must be incorporated into all Integrated Training programs:

- Occupation-related skills,
- One or more work experience placement(s),
- Employability and/or essential skills and when necessary:
- Academic competencies relevant to the occupation/occupational outcome, and/or
- Workplace English as a Second Language.

Integrated Training cannot replace or duplicate Occupational Training certificate or diploma programs.

While it is recognized that the design and delivery of Integrated Training will vary to meet the needs of the individuals and labour market demand, it is strongly recommended that a minimum of 60% of the training occurs in the classroom, or by synchronous e-learning and a maximum of 40% of the training occurs during one or more work experience placements. If more than 40% of work experience is required for a specific individual group, the training provider must provide rationale for the length of the work experience. Program approval or the award of a contract will be granted upon satisfaction with the documentation.

Work experience competencies for each individual will vary for each work experience placement. Training providers will consult with each employer to specify the competencies that an individual will be expected to demonstrate as a result of the work experience placement.

Training providers are expected to meet the following additional program requirements:

- Validation documenting the labour market need. This may include local/regional labour market data such as government occupational projections, employer statements of projections and/or conclusions from an industry/employer focus group.
- Development of an integrated competency profile. The training provider will submit a performance-based integrated competency profile as part of the approval process to the Government of Alberta. These profiles will be accepted by relevant employers and include an outline of all training components that specify in measurable terms the knowledge, skills and behaviors individuals are expected to demonstrate to secure and maintain employment.
- Integrated delivery strategies. Integrated delivery strategies are considered to be essential to the success of Integrated Training. Proposed delivery strategies will be indicated as part of the submission of an Integrated Training application/proposal to the Government of Alberta.
- Duration. Integrated Training must be provided on a full-time basis up to a maximum of 52-weeks. Full-time is defined as not less than 25 hours of training per week. An exception to this full-time requirement is made for persons with disabilities.

Occupational Training

Preamble

Occupational Training is a program element under Skills Development. It is occupation-specific training that provides Albertans the skills they require to secure employment.

Intent

Occupational Training is intended to:

- Provide instruction in occupations that are in demand or experiencing shortages of skilled workers,
- Result in a credential reflecting industry recognized skills and abilities,
- Result in a credential required by industry to become employed in a specific occupation,
- Train for skills that improve an individual's access to higher skilled employment and increased income.

Policy

Occupational Training must include the following program components:

- A minimum of 80% occupation-specific training at the teaching site (classroom/lab/worksite), or by synchronous e-learning and a maximum of 20% on employability skills training,
- Not include more than 20% of work experience,

Occupational Training programs cannot be a journeyperson certificate upgrading program, and cannot duplicate a program already approved by Advanced Education for Student Aid funding.

Occupational Training programs must meet the following additional program requirements:

- Validation documenting the labour market need. This may include local/regional labour market data such as government occupational projections, employer statements of projections and/or conclusions from an industry/employer focus group.
- Identify the industry-recognized credential that is required for a specific occupation.
- Duration. Occupational Training programs must be between 3 and 12 weeks in length.

Transitional Vocational Program (TVP)

Preamble

TVP is a specialized program element under Skills Development. It is intended for individuals that want to be employed upon the completion of their program.

Intent

TVP is intended for individuals who are assessed with a mild developmental disability and have the capacity to be independent.

Policy

TVP must include the following program components:

- Training in employability skills, transferable occupational skills (such as keyboarding/computer skills, use of tools and equipment, safety, etc.), job search and retention skills and independent living/life skills.
- Work experience that is consistent with the individual's interests and abilities and their long-range career goals. Work experience in a competitive worksite is desired rather than in a sheltered work or school environment.

TVP must meet the following additional program requirements:

- Duration. TVP must be provided on a full-time basis up to a maximum of 52-weeks (one academic year). Full-time is defined as not less than 25 hours of instruction/work experience per week. Programs are limited to an academic year of a maximum of twelve months.

TVP may be delivered to individuals by classroom or synchronous e-learning delivery.

Eligibility Criteria

Training Providers must ensure all learners attending TVP meet the following criteria:

- Ensure individuals have a diagnosed developmental disability by a medical professional.
- Ensure individuals are experiencing limitation in adaptive skills and require assistance with communication, home living, community use, health and safety, leisure, self-care, social skills, self-direction, functional academics, and work.
- Are minimally 18 years of age at the program start date.
- Ensure individuals have the ability to participate in training within a work setting without the assistance of a full-time job coach.

Individuals can enter TVP directly upon completion of high school. They are not required to be out of high school for one year (12 months) to be eligible.

Individuals receiving Assured Income for the Severely Handicapped (AISH) benefits will continue to receive these benefits while they are attending TVP.

Integrated Foundational Pathways

Preamble

Integrated Foundational Pathways is a program element under Skills Development. The program enables Albertans to improve their foundational and academic competencies in a supportive and interactive learning environment.

Intent

IFP programs are a blend of essential skills, academics and applied skills development that allow Albertans to build on their foundational competencies while preparing them for further education/training and employment.

Policy

IFP programs must include the following program components:

- Essential skills. Prepares individuals with the skills needed for learning and enabling people to evolve in their education, jobs and life. Examples of content include reading, writing, document use, numeracy, computer use, thinking, oral communication and working with others.
- Academic components in one or more of the following areas:
 - Basic Skills which provide literacy and numeracy skills at Grade 1-6 levels and adult basic education at Grade 7-9 levels.
 - Academic Upgrading which provides the necessary academic competencies at a grade 10–12 level. It includes high school credit courses per Alberta Education curricula, and equivalency courses accepted by post-secondary institutions per Alberta Council for Admissions and Transfers (ACAT) Agreement.
 - ESL to gain the language skills to be proficient in speaking, reading, writing and listening in English.
- Applied skills development. Allows the individual to learn and apply theoretical knowledge in practical situations, in the classroom, and/or on the job to build their experience and increase their effectiveness in real circumstances. This component can also include the first period technical training, or courses/training that lead to credit towards a post-secondary program. Safety courses will only be considered if they are a prerequisite for either the classroom or on the job skill development component.
- The essential skills and academic components must make up a minimum of 50% of the IFP program.

IFP programs must also meet the following criteria:

- Duration. IFP programs must be minimally 12 weeks in length to a maximum of 52 weeks.
- IFP programs will only be approved as full-time program and will require at least 20 hours of instruction per week.

Pre-Apprenticeship

Preamble

Pre-apprenticeship is a program element under Skills Development. The program seeks to close the skills gap by creating access to training for individuals interested in apprenticeship education. This is done by creating opportunities that bridge the gap between the skills learners have and the skills required for success in an apprenticeship program.

The pre-apprenticeship policy will support government's strategic direction to ensure Albertans have access to high-quality post-secondary education, including expanded and strengthened apprenticeship opportunities, in order to build the knowledge, skills, and competencies needed for respected, well-paying careers that contribute to economic growth and diversification.

Intent

This policy will provide guidance to training providers delivering pre-apprenticeship training programs that help learners prepare to enter an apprenticeship program or find entry-level employment at the end of the training period.

The intent is for learners to develop the necessary academic competencies and meet [the minimum entrance requirements](#) in apprenticeship education so they can continue to pursue their educational goals. In addition, learners will gain job specific skills that employers find invaluable, which may help to create a pathway to apprenticeship programs designated under the *Apprenticeship and Industry Training Act*.

Policy

Pre-Apprenticeship programs must include the following program components:

- Either a pre-apprenticeship fundamentals and/or a pre-apprenticeship advanced component.
- The pre-apprenticeship fundamentals component must include:
 - Academic upgrading courses to attain [the minimum entrance requirements](#) to pursue apprenticeship education.

- ESL or English for Academic Purposes to facilitate language acquisition for entry into an apprenticeship program or employment.
- Exposure to multiple trades and experience in a variety of areas; rotate through different trades and gain hands-on, practical knowledge through theory and on-the-job work experience.
- [Trades entrance exam](#) preparation.
- The pre-apprenticeship advanced component must include:
 - Emphasis on one principal trade. May include exposure to minimally one or more additional related secondary trades.
 - Academic upgrading to attain the minimum entrance requirements into the post-secondary system, including apprenticeship education so that the learner can pursue their educational goals.
 - One work experience placement of minimally 8 weeks or two work experience placements of a maximum 12 weeks combined.
 - On the job experience through work experience placement(s) and/or other methods.
 - Learner's work experience may earn credit towards [advanced standing](#) in an apprenticeship program based on work experience placement or classroom training.
 - Work experience placements must be trade appropriate and based on the trade [requirements](#) in order for those learners choosing a pathway into apprenticeship programs.
 - [Trades entrance exam](#) preparation.
- ESL and Academic components must precede any practical hands-on exposure to trades including work experience.

Pre-Apprenticeship programs must also meet the following criteria:

- Duration. Up to a maximum of 52 weeks with work experience placements between 8 and 12 weeks in length. The length of training can be extended to accommodate pre-apprenticeship learners who may not have had the same opportunity to train in the workplace as registered apprentices.
- Job readiness components according to the needs of the learners (e.g.; job-search, job readiness, and interview skills).
- Relevant safety training e.g. WHMIS, Workplace Health and Safety, First Aid. All safety training must take place prior to the work experience placement.

Foundational Learning

Foundational Learning provides training to individuals to pursue further training and/or employment. Program elements include:

- Academic Upgrading – in Grades 10 to 12.
- Basic Skills – training in literacy and numeracy (grades one to six), adult basic education (grades seven to nine), life skills/personal management training.
- English as a Second Language (ESL) – training to improve English language competencies for individuals whose first language is other than English.

All foundational learning programs can be delivered by classroom or synchronous e-learning.

Academic Upgrading

Preamble

Academic Upgrading is a program element under Foundational Learning. The program provides Albertans the opportunity to develop academic competencies at a Grade 10 to 12 educational levels.

Intent

The goal of Academic Upgrading programs is for learners to pursue further training and/or become employed.

Policy

Academic Upgrading must include the following program components:

- Academic Upgrading programs, including college preparation, must be designed to meet the program outcomes of the Grade 10 to 12 levels. Training may also include supervised, for-credit work experience.
- General Educational Development (GED) programs at the Grade 10 to 12 level satisfy minimum academic requirements of a high school education and if approved by the Government of Alberta may be considered under Academic Upgrading.
- University and College Entrance programs (UCEP) are intensive one-year programs that enable learners to achieve the necessary matriculation course equivalents for admission to Alberta post-secondary institutions under the non-matriculated applicant requirements.
- Technical Entrance Preparation programs are intensive upgrading programs designed to provide entrance requirements for programs at one of Alberta's technical institutes. Programs are designed from the point of view of practical application.

Academic Upgrading programs must also meet the following criteria:

- A single Occupational training or Post-Secondary course may be considered in the last term as one of the 3 courses the student is enrolled in if all the following conditions apply:
 - The course is in the last semester of the learner's upgrading
 - The learner has met the academic pre-requisites in their upgrading for the course or program
 - The course is a component of further training or employment
 - Successful completion of the course accelerates or assists the learner to reach their training or employment goals sooner.
 - The overall costs to the Government of Alberta are reduced as the length of support to the learner will be less in the long term
 - To facilitate data entry the one occupational/post-secondary course will be coded as Academic Upgrading as the majority of the courses taken in the term will be in the academic upgrading stream.
- All programs included in the Academic Upgrading program element must result in a recognized credential and be offered by a recognized public institution or an approved training provider. A recognized credential is a credential that is recognized by both the issuing institution and by other receiving institutions. The [Alberta Transfer Guide](#) identifies transfer agreements for Academic Upgrading programs and courses among post-secondary institutions in Alberta.
- Condensed programs can be offered if the following criteria are met:
 - The learner must be enrolled in not less than 18 hours per week and a minimum of two courses in eight weeks or not less than 18 hours per week and a minimum of one course in six weeks.
 - The courses to be taken must clearly be prerequisites to meeting the learner's employment goal.
 - The courses must not be available at any other time.
 - Courses must either be part of the individual's final term before going on to occupational, apprenticeship or post-secondary training, or shorten the period of training required by the individual by a term.
 - The learner must be full-time.

Basic Skills Training

Preamble

Basic Skills Training is a program element in the Foundational Learning program.

Intent

Basic Skills programs assist Albertans in developing the competencies needed to pursue further training and/or employment.

Policy

Basic Skills programs must include the following program components:

- Literacy and Numeracy (Grades 1-6)
- Adult basic education (Grades 7-9)
- Life Skills/Personal Management. This enables the individual to develop the employability skills needed for employment. It includes personal management skills, life management skills, career and employment exploration and basic academics.
- Literacy and Numeracy and Adult Basic Education courses must not be used to enhance an individual's ESL level.
- One work experience course may be included if the learner's intent is to move directly to employment upon completion of Basic Skills Training.
- Work experience components must meet the following criteria:
 - May be included as a third course in the final term of a Basic Skills Training program if the individual is intending to move to employment and this is confirmed by supporting documentation,
 - May be taken as a fourth course at any time, whether the individual is moving to employment or further training,
 - Is restricted to one course only as part of a Basic Skills program
 - Is not used as a substitute for volunteer work,
 - Includes both classroom instruction and one or more supervised worksite placements.

Basic Skills programs must also meet the following criterion:

- Must result in a recognized certificate. The individual must be supported to develop competencies up to and including the Grade 9 levels in order to achieve sustainable employment and/or pursue further training.

English as a Second Language

Preamble

English as Second Language (ESL) is a program element under Foundational Learning. The program provides the basis for Albertans whose first or primary language(s) is other than English and who require specific programming to develop language proficiency to achieve successful educational and employment outcomes.

Intent

ESL programming is for learners to increase their skills in listening, speaking, writing and reading skills so they are able to pursue further training and/or employment.

Policy

ESL programs must include the following program components:

- All or some of the four language competency areas (listening, writing, speaking and reading) must be part of the curriculum.
- Language testing such as TOEFL or IELTS may be included.
 - The language testing component must be indicated at the time the program is approved.
 - Preparation for the language testing may be a part-time course or a component in a full-time program.
 - The cost of the language testing may be considered for full-time learners while attending their ESL program through the Employment Training and Transition Supports benefit which is issued directly to the learner. The payment of the testing fee to the test administrator or training provider is the responsibility of the learner.
- Workplace training may be included if the following criteria are met:
 - Participating employers must not receive any compensation from training providers for providing work experience opportunities for learners. In addition, training providers must ensure employers'

- compliance with the *Occupational Health and Safety Act* and other labour-related rules and regulations.
 - Learners must to comply with work place requirements related to Occupational Health and Safety rules and other employer requirements.
 - Learners must comply with the training provider's and employer's attendance policies.
- ESL may be provided on both a full-time and part-time basis. A full-time learner must be enrolled minimally 20 hours a week.

Chapter 8: Training Provider Information and Responsibilities

Program Approval

Authority:

Income and Employment Supports Act, Section 20

Income and Employment Supports Act, Section 26(a)

Training Provider Regulation

To be eligible for Learner Income Support and/or Training Benefits the program must be approved and funds must be allocated to the program. Funding for approved programs is determined annually by the Minister's allocation process. The following types of training programs can be considered for approval:

- Adult Basic Education (Grades 1-6)
- Adult Basic Education (Grades 7-9)
- Academic Upgrading (Grades 10-12)
- English as a Second Language (ESL)
- Integrated Foundational Pathways
- Integrated Training
- Pre-apprenticeship Training
- Occupational Training programs less than 12 weeks
- Transitional Vocational Programs

Mandatory Certification

All training providers must meet the requirements of any mandatory licensing or accrediting processes required by other authorities and/or ministries.

Private training providers applying to the Government of Alberta for program approval must be a legal entity, registered with the Alberta Corporate Registry.

Financial Security

Private training providers must provide financial security to the Minister in the form of a Surety Bond or irrevocable Letter of Credit prior to final approval of a program. The Minister will determine the financial security required. Maintenance of financial security is a requirement for continued program approval. Training providers must seek approval prior to making any changes to the amount of security in place.

If, in the opinion of the Minister, a training provider fails to comply with the *Income and Employment Supports Act*, related regulations, policies or agreements with the Government of Alberta, then the security may be forfeited.

Insurance

Training providers must, at their own expense insure their operations under a General Liability Insurance contract, in accordance with the *Alberta Insurance Act*, in an amount of not less than \$2,000,000 inclusive per occurrence. Such insurance must cover personal injury and property damage, including loss of use thereof. Such insurance shall include Blanket Written Liability and Non-Owned Automobile Liability.

If operating vehicles, owned or licensed in the name of the training provider for the purpose of delivering an approved program, the training provider shall maintain automobile liability insurance on all vehicles owned, operated or licensed in the name of the training provider in an amount not less than \$1,000,000.

Training providers delivering programs in privately-owned buildings (a building not owned by the Government of Alberta) shall submit certificates of insurance to the department prior to the final approval of the program. All required insurance shall be endorsed to provide the Minister with 30 days advance written notice of cancellation or material change restricting coverage.

Fire and Health Inspections

Note: Fire and Health inspections conducted by the appropriate municipal authority are required by all public and private training providers delivering programs in facilities that are privately owned. Fire and Health inspection certificates must be current and must be submitted to the Government of Alberta as a condition of the final approval of the program. For more information on how to apply for program approval, please contact AE.FoundationalLearning@gov.ab.ca

Roles and Responsibilities Acknowledgement and Program Maintenance

Training providers must sign an acknowledgement that they are aware of their roles and responsibilities. Training providers must notify the Government of Alberta of any changes in their circumstances that may adversely affect program delivery and must supply financial information upon request. Programs will be reviewed regularly to ensure compliance with policy and regulatory requirements to ensure outcomes are achieved.

If an approved program has not accepted a funded learner for a period of two academic years (August 1-July 31) the program approval will be terminated.

Training providers must advise the Government of Alberta of any proposed changes and receive approval before making the change to:

- The program for e.g., duration, instructional hours, instructor qualifications
- Tuition, fees, books or supplies
- The premises at which training is provided
- The security provided
- Ownership

Annual Collection of Session Dates and Costs

When collecting yearly session dates and costs from applicable training providers, the potential impact of fee increases will be considered.

Tuition and fee levels established by the training provider are in effect for programs commencing in the upcoming academic year. Increases must be approved by Advanced Education.

Allocation Management

Authority:

Income and Employment Supports Act, Section 21

Income and Employment Supports Act, Section 26

Training Provider Regulation, Section 3 and 5

Note: Annual program budgets are based on provincial strategic priorities and policy direction. A training provider's allocation is approved for the fiscal year (April 1st to March 31st) by the Minister and is the amount of reserved funding available to learners participating in approved training programs. An allocation is reflective of tuition and prescribed fee costs.

Tuition and prescribed fees are paid in one or more disbursements to the training provider on behalf of the learner and are debited from their allocation.

The Minister determines a training provider's allocation amount based on strategic priorities and information gathered in the Foundational Learning Allocation Projection Plan (FLAPP). Training providers complete the FLAPP at the beginning of each calendar year. Training providers report on the previous fiscal year's allocation utilization and provide a forecast for the upcoming fiscal year.

Allocation decisions will be communicated to training providers in writing through an Allocation letter, or another means that the Director determines appropriate.

Allocation Management Requirements

Training providers are required to track allocation commitments and utilization. The Government of Alberta will also monitor allocation utilization. The Government of Alberta sends Learner Status Reports to Training Providers that indicate the status of a learner's application to assist with managing their allocation.

A training provider who, in the opinion of the Director is not managing their allocation appropriately may be subject to remedial action.

Movement of funds across programs is allowed except between Transitional Vocational Program (TVP) and other approved programs.

Training providers with Foundational Learning Supports Grant Agreements must also follow the requirements of their Grant Agreement.

Training Benefits Overpayment Calculation and Reconciliation Process

Authority:

Income and Employment Supports Act, Part 3, [Section 21](#)

Income and Employment Supports Act, Part 3, [Section 22](#)

Income and Employment Supports Act, Part 3, [Section 25](#)

Training Provider Regulation, [Section 1](#)

Training Provider Regulation, [Section 3](#)

Training Provider Regulation, [Section 5\(1\)\(i\)\(iv\)](#)

The Government of Alberta expects training providers to refund training benefit debts as soon as possible to ensure the maximum utilization of allocations. In the event a learner has never attended or withdrawn from the training session prior to completion, the training provider may be required to refund a portion of the tuition and fees. Learners may also be required to refund books and supplies.

Training providers participating in a Grant Agreement with the Government of Alberta refer to the process outlined in the Grant Agreement.

All other training providers must follow the part-time and full-time overpayment calculations.

Part-Time Training Overpayment Calculation

When a part-time learner receives an award under the Skills Investment Bursary and does not attend training, 100% of the tuition and fees paid to the training provider on behalf of the learner must be refunded to the Government of Alberta. Books and supplies will also be considered repayable by the learner.

When a part-time learner is withdrawn from training, the tuition and fees paid on behalf of the learner are subject to the training provider's withdrawal policy. Any refunds owing are payable to the Government of Alberta. Books and supplies are not repayable.

Full-Time Training Overpayment Calculation

When a full-time learner does not attend training, 100% of the tuition and fees paid to the training provider on behalf of the learner less a \$50 administration fee must be refunded to the Government of Alberta. Books and supplies will also be considered repayable by the learner.

When a full-time learner is withdrawn from training Mobius automatically calculates the overpayment to the training provider as follows:

Determines the number of calendar days in the training session.

- Determines the number of calendar days the learner attended based on the withdrawal date.
 - If the learner attended less than 1% of a training session, training providers are required to refund all tuition and fees paid on behalf of the learner, less a \$50 administration fee. Books and supplies for that training session are not repayable.
- If the learner attended between 1% and 20% of a training session, 75% of the tuition and fees paid on behalf of the learner must be refunded to the Government of Alberta (GOA). Books and supplies for that training session are not repayable.
- If the learner attended between 21% and 40% of a training session, 40% of the tuition and fees paid on behalf of the learner must be refunded to the GOA. Books and supplies for that training session are not repayable.
- There is no overpayment calculated if the learner attends 41% or greater of the training session.

Overpayments of books and supplies to learners will be collected according to the Learner Income Support Overpayments and Debts policy.

Overpayment Notification

Mobius generates a monthly Notice of Tuition and Fee Overpayments letter to Training Providers. This letter details the learners who were reported as never attended or withdrawn the previous month and the calculated overpayment amount due. The training provider has 30 days from the date of the monthly **Notice of Tuition and Fee Overpayments** letter to validate and send the refund to the Government of Alberta.

Questions regarding the overpayment calculation can be directed to LISO by phone at 780-644-1348, by fax at 780-415-9947, or by email at LISO@gov.ab.ca.

Refunds are payable to:
Government of Alberta
Learner Income Support Office
P.O. Box 17000, Station Main
Edmonton, Alberta, Canada T5J 4B3

It is recommended a copy of the Monthly Notice of Tuition and Fee Overpayments letter is sent with the payment or the following information provided:

- The learner name,
- The reason the learner was withdrawn (e.g., unacceptable attendance or progress),

- The withdrawal date, and
- The amount.

In the event that a payment is not received within 30 days of the Notice of Tuition and Fee Overpayments, a Notice of Amount Owing letter is issued in accordance with Section 25 of IESA. The training provider has the right to appeal within 30 days or pay the amount owing.

If after 30 days of the Notice of Amount Owing letter an appeal or payment is not received, the debt is considered as owing to the Government of Alberta. In accordance with Section 22 of IESA, the Director will determine how the debt will be recovered. A Non-Compliance Letter will be delivered outlining the unpaid debt(s) owing, and as a result, the training provider is considered non-compliant. The letter will indicate the Director's decision and remedial action that will be implemented to collect on the debt(s) owing. Examples include removal of program approval, sending the debt(s) to collections, declaring against the training provider's financial security.

Right to Appeal

A Notice of Appeal form will be attached to the Notice of Amount Owing Letter. Completed forms are to be forwarded to the Appeals Secretariat at 2nd Floor, Agronomy Centre, 6903 - 116 Street, Edmonton AB, T6H 5Z2.

The Appeals Secretariat will contact the training provider to arrange a hearing date and time. No further action will occur until the appeal decision is reached.