

Department: Career Planners, Data, Fiscal

1. Purpose: To standardize the process for delivering supportive services to clients while telecommuting.

2. Responsibilities:

a. Career Planner (CP): The CP is responsible for:

- i. Working with clients to complete supportive service requests following the standard *Supportive Service Process*.
- ii. Working with the Reviewer to provide gas cards and bus passes to clients.
- iii. Completing the Google Sheet daily.
- iv. Providing copies of signed forms to Fiscal.

b. Reviewer: The Reviewer is responsible for:

- i. Reviewing and approving supportive service forms and purchase request forms as submitted.
- ii. When utilizing the telecommuting process, there will only be **one reviewer**/ approver to reduce time in completing supportive service requests.
- iii. Once approved, returning the request form to the CP or forwarding on to Fiscal depending on the request type.
- iv. In the event of Windows to Work requests, the Program Manager will review and approve requests.
- v. Working with the CP to get items to clients as needed.

c. Fiscal:

- i. Processing signed forms following the standard *Supportive Service Process*.

3. Process:

a. When CPs are communicating with clients about supportive service needs, **reimbursement** to the client should be considered the **primary method of payment**.

- i. NOTE: For gas card reimbursements, the card **must be** a gas only card. Gift cards will not be reimbursed.

b. In the event that the client cannot afford the initial purchase, the CP will discuss with the Reviewer the best method for getting the item to the client.

- i. For CPs with regular client requests for items such as gas cards/ bus passes, a small stack of cards will be given to the CP to provide to clients.
- ii. The CP will be responsible for following the standard Support Services Process (*i.e. submitting forms and receiving approval before purchase or distribution*), ensuring the client signs the form when the item is received, and for completing the Google Sheet daily to detail which items have been given out to clients for reconciliation purposes. Additionally, signed forms must be electronically submitted to Fiscal following the standard *Supportive Service Process*. This means that the original approved supportive service request form must be included with receipts or new purchase request forms for ongoing payments. Approved forms can be either an electronic form or an image using the recommended programs (i.e. Microsoft Lens)

iii. Google Sheet:

<https://docs.google.com/spreadsheets/d/1RdyWFSeJ5JHU65YLXyiEQdSVo1fJPPvGbB-an3ymUfg/edit?usp=sharing>

4. Additional Resources

- a.** See *Supportive Service Process*

5. Back-up

- a.** Each CP is responsible to communicate and provide the details of his/her back-up with everyone.
- b.** For review and signature, the back-up for:
 - i. The Reviewer is the Executive Assistant/ HR Coordinator.