

FAQs: Reporting on Direct Funding Simplified Agreements (Agents)

This document provides Agents with *Direct Funding Simplified Agreements* (Agreement) answers to common questions asked about submitting a *Compliance Report* (Report).

Q1. How can I submit my Reports?

A1. Reports can be submitted on-line through the Direct Funding Financial Reporting System at <https://if.communitylivingbc.ca>. You also have the option of completing manual *Compliance Reports* and faxing or mailing them to the contact information listed on the form; or dropping them off at your local CLBC office.

Q2. How often do I need to submit my Reports?

A2. Reports must be submitted every six months or less depending on the start and end date of your Agreement. Below are some examples:

Example 1: An Agreement with a term starting January 1, 2018 and ending on March 31, 2019 requires Reports for the following periods:

- January 1, 2018 to June 30, 2018 (6 months)
- July 1, 2018 to December 31, 2018 (6 months)
- January 1, 2019 to March 31, 2019 (3 months)

Example 2: An Agreement with a term starting July 18, 2018 and ending on June 30, 2020 requires Reports for the following periods:

- July 18, 2018 to December 31, 2018
- January 1, 2019 to June 30, 2019
- July 1, 2019 to December 31, 2019
- January 1, 2020 to June 30, 2020

Example 3: An Agreement with a term starting March 1, 2019 and ending on May 23, 2020 requires Reports for the following periods:

- March 1, 2019 to August 31, 2019
- September 1, 2019 to February 29, 2020
- March 1, 2020 to May 23, 2020

Q3. Where can I find my Agreement Number and PRISM ID?

A3. Your Agreement Number can be found on Page 1 of your Simplified Agreement. The PRISM ID can be found on Page 5 of your Agreement.

Q4. I entered my Agreement Number and PRISM ID in the Direct Funding Financial Reporting System, but I got a message saying that my Agreement Number or PRISM ID could not be found. What can I do?

A4. Double-check your Agreement to ensure the information you entered in the reporting website matches the information in your Agreement. If the information matches and you continue to get the error message, contact your CLBC Quality Service Analyst (Analyst).

Q5. Who is my CLBC Analyst?

A5. The name and contact information of your Analyst is listed on page 4 (signature page) of your *Direct Funding Simplified Agreement*.

Q6. Why am I being asked to submit a Report for a period that is less than six months?

A6. Reports must be submitted for each six-month period, or less, depending on the start and end date of your Agreement. See **Q2** for examples.

Q7. When are my Reports due?

A7. Reports must be submitted to CLBC no later than 30 days after the end date of the reporting period.

Example:

If the end date of your reporting period is June 30, 2019, the Report must be received by July 30, 2019 (30 days after June 30).

Q8. If I spend more money than what I receive, what amount do I report?

A8. Always enter the total amount spent even if it is more than what you received.

Q9. How can I confirm CLBC received my Report?

A9. When you submit your Report on-line, you will receive a confirmation number and a message indicating your Report has been submitted. This is your confirmation the Report was received by CLBC. You will need to save or print a copy of your Report; the Report includes your confirmation number.

Q10. Am I required to print a copy of my submission?

A10. Once you submit your Report, you will be prompted to print copy of your submission to keep with your financial records.

Your submission report will provide the Agreement Number, reporting period, amount reported and the confirmation number. If you don't have access to a printer, clicking on the 'Print' button will also provide you with the option of "printing" to a PDF file and then you can save the file to your computer. If you are unable to print or save, make sure you write down the confirmation number and keep it with your financial records.

Q11. I submitted my Report using the on-line reporting system, how can an error in a previously submitted Report be corrected?

A11. You can submit another Report using the same reporting period dates. The system will recognize the new Report is being submitted for the same reporting period and will allow you to resubmit the Report.

Q12. Am I required to submit Reports online?

A12. No. You have the option to submit the manual *Compliance Report* by mail or fax to the contact information listed on the form; or by dropping off the Report at your local CLBC office. We encourage you to submit your Report online as it will make submitting simpler, easier to get reports in on time, and enhance the security and privacy of the information because it will go directly to CLBC through a secure server.

Q13. If I submit a Report online, do I still need to complete the manual *Compliance Report* attached to my Agreement and submit it to CLBC?

A13. No. The online system replaces the manual *Compliance Report*. If you choose the online option, you should refer to the manual *Compliance Reports* for your reporting periods.

Q14. Why did I receive a reminder letter to submit an overdue Report when I already sent the Report?

A14. It is likely the reminder letter list was prepared before CLBC received your Report. If you have a confirmation number for your submission, it confirms CLBC received your Report. If you submitted the Report well before the date of your reminder letter, please follow up with your CLBC Analyst and they will investigate it for you.

Q15. Am I able to submit an on-line Report for any past reporting period?

A15. You can submit an on-line report for any valid reporting period for an Agreement that is active as of October 31, 2019 or later.

Example 1: If an Agreement is for October 1, 2018 to September 30, 2019 and subsequently renewed for October 1, 2019 to September 30, 2020, below are the reporting options for the reporting periods:

- October 1, 2018 to March 31, 2019 (manual only)
- April 1, 2019 to September 30, 2019 (manual only)
- October 1, 2019 to March 31, 2020 (on-line or manual)
- April 1, 2020 to September 30, 2020 (on-line or manual)

Example 2: If an Agreement is for November 1, 2018 to October 31, 2019 and subsequently renewed for November 1, 2019 to October 31, 2020, below are the reporting options for the reporting periods:

- November 1, 2018 to April 30, 2019 (on-line or manual)
- May 1, 2019 to October 31, 2019 (on-line or manual)
- November 1, 2019 to April 30, 2020 (on-line or manual)
- May 1, 2020 to October 31, 2020 (on-line or manual)

Q16. What resources are available if I need further help using the Direct Funding Financial Reporting System?

A16. There is a 'Help' button on each page of the reporting system. Clicking the button will lead to a step-by-step video of how to complete a Report for Simplified Agreements. You can also refer to the *Managing the Money: Direct Funding Simplified Agreement Guide* and the *Helpful System Hints for Direct Funding Simplified Agreements* document located at www.communitylivingbc.ca/IF under the "Learn more about Individualized Funding" section. Otherwise, contact a Vela Canada facilitator at info@velacanada.org or 604-539-2488 or your CLBC Analyst for further assistance.