



## Memorandum

---

Date: May 12, 1995

To: Directors of Income Security

From: Gerry Schmidt/Helmut Klein  
Directors of Field Operations  
Social Allowances Program  
Income Security &  
Regional Operations  
301-267 Edmonton Street

Telephone:

Subject: **New SAMIN Transaction – Request Form (REFO)**

---

Based on a recommendation from the Workload Committee, a new transaction in SAMIN has been programmed to allow workers to send out Annual Reviews, Attendance and Progress reports, and Income Declaration forms to recipients when required.

The new transaction (REFO) will be available in SAMIN effective Monday, May 15, 1995.

The issuing of these forms to a client will in no way affect the production of the regular forms or reports for the case, eg., if the Annual Review date for the case is June and the worker wants an additional Annual Review date for the case is June and the worker wants an additional Annual Review to go out in February, the Annual Review date for the case will remain as June and the system will continue to produce the Annual Review for the case in May for receipt in the District Office by June. A client who may have misplaced their Income Declaration or Attendance and Progress report can be provided with a duplicate through the system by utilizing the REFO transaction.

These forms can also be requested for cases that would not automatically receive one of the forms from the system as in the following examples:

- Annual Review - An Annual Review can be sent to a case in an institution that shows in SAMIN that the Annual Review is Suppressed.
- Income Declaration - An Income Declaration form can be sent to a case for the purpose of reporting anticipated income such as Maintenance, Accident Settlements or Unemployment Insurance benefits.
- Attendance and Progress - An Attendance and Progress report can be sent to a client without the Education/Vocational screen being completed.

To request one of the above documents the transaction REFO (request form) and the case number must be entered in the Tran and Key fields in SAMIN respectively. A copy of the screen is attached.