



Annual Rent-Geared-to-Income (RGI) Review Form

ADDRESS:	
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SECTION A: CONTACT INFORMATION

Name (adult household member):	Phone #:	Email:
Name (adult household member):	Phone #:	Email:
Emergency contact name:	Emergency telephone # and email	Relationship to you
Number of vehicle(s) requiring parking	Make/model of vehicle(s):	License plate(s):

SECTION B: HOUSEHOLD COMPOSITION

LIST EVERYONE WHO LIVES IN YOUR HOME, THEIR DATE OF BIRTH, RELATIONSHIP TO THE MAIN HOUSEHOLD MEMBER, AND IF THEY HAVE MOVED IN OR OUT SINCE YOUR LAST REVIEW.

	NAME First and Last	BIRTH DATE (DD / MM / YYYY)	RELATIONSHIP TO MAIN HOUSEHOLD MEMBER (E.g., spouse, son, daughter, etc.)	NEW MOVE IN or NEW MOVE OUT?	DATE OF MOVE-IN or MOVE OUT (DD / MM / YYYY)
1			Main Household Member	IN <input type="checkbox"/> OUT <input type="checkbox"/>	
2				IN <input type="checkbox"/> OUT <input type="checkbox"/>	
3				IN <input type="checkbox"/> OUT <input type="checkbox"/>	
4				IN <input type="checkbox"/> OUT <input type="checkbox"/>	
5				IN <input type="checkbox"/> OUT <input type="checkbox"/>	
6				IN <input type="checkbox"/> OUT <input type="checkbox"/>	
7				IN <input type="checkbox"/> OUT <input type="checkbox"/>	
8				IN <input type="checkbox"/> OUT <input type="checkbox"/>	
9				IN <input type="checkbox"/> OUT <input type="checkbox"/>	

SECTION C: HOUSEHOLD INCOME

PLEASE MARK "X" BESIDE THE INCOME TYPE FOR EACH HOUSEHOLD MEMBER. Remember, everyone needs to report their income and attach their Notice of Assessment (NOA) or Proof of Income Statement (Option 'C' Print from your Canada Revenue Agency 'My CRA Account').

Income Type	#1	#2	#3	#4	#5
(Please mark "X" beside the income type for each household member)					
Ontario Works (OW) or Ontario Disability Support Program (ODSP)* *Additional Documents Required: A current document that shows the <u>amount you receive</u> each month and the <u>people</u> that are part of your benefits. E.g.: current statement of assistance from your MyBenefits account	<input type="checkbox"/>				
Employment* : Employment income, Employment Insurance (EI), Worker's Compensation benefits, Self-employment, Other employment income *Additional Documents Required for Self-Employment: Completed Canada Revenue Agency (CRA) T2125 Statement(s) of Business or Professional Activities	<input type="checkbox"/>				
Pension(s) : Old Age Security (OAS), Canada Pension Plan (CPP), Guaranteed Income Supplement (GIS), GAINS	<input type="checkbox"/>				
Other (specify): OW emergency funds for rent arrears, RDSP income, RRSP income, interest or other investment income, taxable scholarship or fellowships bursaries and grants	<input type="checkbox"/>				

SECTION D: REQUIRED HOUSEHOLD INCOME DOCUMENTS

CRA NOTICE OF ASSESSMENT or PROOF OF INCOME STATEMENT FOR EVERYONE AGED 16+* ARE ATTACHED (with supporting documents such as completed Income Tax and Benefit Return) **YES** **NO**

If **NO**, please explain:

**Note: Sixteen (16) and seventeen (17) year olds who are in school full-time do not need to submit a CRA Notice of Assessment or Proof of Income Statement*

OW and ODSP STATEMENT IS ATTACHED (if applicable) **YES** **NO**

If **NO**, and applicable, please explain:

CRA T2125 STATEMENT OF BUSINESS OR PROFESSIONAL ACTIVITIES IS ATTACHED (if self-employed) YES NO

If **NO**, and applicable, please explain:

SECTION E: FULL-TIME STUDENTS

ARE ANY HOUSEHOLD MEMBERS FULL-TIME STUDENTS? YES NO

If **YES**, list the names of all full-time students and attach school documentation:

All full-time students must attach documentation that shows the name of the school they attend, the course load, and the study period, such as:

- Letter from a funding agency (e.g.: OSAP)
- Letter on corporate letterhead from principal or registrar
- Certified timetable for the school term from the institution
- Receipt from institution showing tuition fees paid

SECTION F: CANADIAN CITIZENSHIP

PROOF OF CITIZENSHIP OR IMMIGRATION STATUS OF ALL HOUSEHOLD MEMBERS IS ATTACHED YES NO

If **NO**, please explain:

SECTION G: HOUSEHOLD ASSETS

Please fill in the value of any assets owned by you and each household member 16 years of age and older. If the total value of household assets is equal to or more than \$40,000 for a single person household or \$65,000 for a household with two or more people, you must attach proof. See Appendix A.

Type of Asset	#1	#2	#3	All Other People (combine)	Proof Attached
Bank Account	\$	\$	\$	\$	<input type="checkbox"/>
Value of 2 nd or more Personal Vehicles	\$	\$	\$	\$	<input type="checkbox"/>
Investments	\$	\$	\$	\$	<input type="checkbox"/>
Real Estate Equity	\$	\$	\$	\$	<input type="checkbox"/>
Life insurance	\$	\$	\$	\$	<input type="checkbox"/>

Type of Asset	#1	#2	#3	All Other People (combine)	Proof Attached
Business assets	\$	\$	\$	\$	<input type="checkbox"/>
Disability trust fund (over \$100,000)	\$	\$	\$	\$	<input type="checkbox"/>
Other assets (list)	\$	\$	\$	\$	<input type="checkbox"/>
Total	\$	\$	\$	\$	

SECTION H: RENT-GEARED-TO-INCOME (RGI) RULES

Rent-Geared-to-Income (RGI) rules are set by the Province of Ontario in the *Housing Services Act, 2011* and associated regulations, and by the City of Ottawa as set out in Service Manager (SM) Directives. Some of the frequently referenced and important rules are summarized below. To remain eligible for RGI assistance, you must follow these rules as a condition of ongoing eligibility for an RGI subsidy. If you don't follow these rules, you could lose your rent subsidy and your rent could go to market rent.

Please read each rule and confirm that you have read and understand the rules below.

Rules
<ul style="list-style-type: none"> • Verification of RGI eligibility happens every twelve (12) months at your annual review (<i>O. Reg 316/19 and SM Directive 25-02</i>).
<ul style="list-style-type: none"> • RGI rent is calculated once every twelve months at your annual review (<i>O. Reg 316/19 s.10</i>).
<ul style="list-style-type: none"> • Household composition and the size of RGI unit the household is eligible for is determined within 31 days of the change (<i>O. Reg 367/11 s. 38 & 42 and SM Directives 25-01 and 25-02</i>).
<ul style="list-style-type: none"> • Everyone aged sixteen* (16) and older is required to file an income tax return every year (<i>O. Reg 367/11 s. 29.1 and SM Directive 25-02</i>). *Note: Sixteen (16) and seventeen (17) year olds who are in school full-time do not need to file an income tax return.
<ul style="list-style-type: none"> • Everyone over the age of sixteen (16) and not in school full-time is required to pursue income (<i>O. Reg 367/11 s. 31 and SM Directive 25-02</i>).
<ul style="list-style-type: none"> • A household that has been determined to be eligible for RGI assistance ceases to be eligible if the total value of household assets exceeds the Household Asset Limit. (<i>O. Reg 367/11 s. 32.5 and SM Directive 25-02</i>). The Household Asset Limits are \$50,000 for a single person household and \$75,000 for a household of two (2) or more people.
<ul style="list-style-type: none"> • RGI households must provide information that is requested for the purpose of determining eligibility for RGI assistance and rent payable (<i>O. Reg 367/11 s. 29</i>).
<ul style="list-style-type: none"> • Changes in Information (O.reg 367/11 s. 28 and SM Directive 25-02): The following changes must be reported <u>within 31 days of the change</u>: <ul style="list-style-type: none"> • A permanent change in the composition of the household. • A change in a member of the household's full-time student status. • A member of your household starts or stops receiving Ontario Works (OW) or Ontario Disability Support Program (ODSP) financial assistance. • A member of your household's income tax has been reassessed or additionally assessed.

<ul style="list-style-type: none"> • A permanent increase in monthly non-benefit income for any household member receiving OW or ODSP financial assistance.
<ul style="list-style-type: none"> • Local RGI occupancy standards allow one (1) bedroom for a spousal couple, and one (1) bedroom for each additional member of the household. A household is “overhoused” when they live in a unit that is too large for their family size based on occupancy standards. When a household is overhoused, everyone is required to move to a smaller unit (O. Reg 367/11 s. 38 & 42 and SM Directive 25-01).
<ul style="list-style-type: none"> • An overhoused household ceases to be eligible for RGI assistance if the household refuses one (1) valid offer of housing and has been overhoused for a period of one year or more (O. Reg 367/11 s. 32.2 and SM Directives 25-01 and 25-02).
<ul style="list-style-type: none"> • Household members are expected to occupy and live in the unit where they receive RGI assistance. The maximum period that <i>all household members</i> may be absent and away from their unit is 60 consecutive days or a total of 90 cumulative days in a calendar year, except for medical reasons (O. Reg 367/11 s. 37 and SM Directive 25-02).
<ul style="list-style-type: none"> • If a household has paid an RGI rent that is equal to the market rent for their RGI unit for 24 months because of their income, the household’s status changes from an RGI to a market household and the household must re-apply to the Centralized Wait List (CWL) for any future rent subsidy (O. Reg. 367/11 s. 30).
<ul style="list-style-type: none"> • RGI households must divest residential property within 180 days from the first day of the month in which the household receives RGI assistance or takes ownership of a residential property if the household is already in receipt of RGI assistance (O. Reg. 367/11 s. 32 and SM Directive 25-02).
<ul style="list-style-type: none"> • A household that has been determined to be eligible for RGI assistance cease to be eligible if the household: <ul style="list-style-type: none"> ○ fails to meet basic RGI eligibility requirements – age, independence, and citizenship; ○ a removal order has become enforceable under the Immigration and Refugee Protection Act (Canada) against any member of the household; ○ if a member of the household owes, with respect to a previous tenancy, arrears of rent, an amount required by a service manager, or damage caused by a current member of the household (O. Reg. 367/11 s. 27); or ○ has accepted an offer of financial assistance referred to in section 20.1 and begins to receive that assistance. (O. Reg. 367/11 s. 32.2).

SECTION I: DECLARATION

I/WE HAVE READ AND UNDERSTAND THE RGI RULES AND CERTIFY THAT THE INCOME AND HOUSEHOLD INFORMATION IN THIS FORM AND ATTACHED IS ACCURATE AND COMPLETE (Everyone who is 16 years of age or older must sign this form).

Printed name(s)	Signed name(s)	Date signed

Determination or Verification of Eligibility for Rent-Geared-to-Income (RGI) Assistance

I/We, _____

consent to the collection, use, disclosure, and verification of our personal information to an authorized representative of **Housing Provider Name** for the purpose of determining or verifying the initial or ongoing eligibility of my household for rent geared-to-income (RGI) assistance, including my household income and administering my rental housing subsidy.

1. Without restricting the generality of the consent in this section, I/we specifically consent to the release of information relating to any bank account, assets of any nature or kind whatsoever held by me/us/our dependent children, alone or jointly with any other person, from any financial institution.
2. I/we further consent to an authorized representative of **Housing Provider Name** disclosing to any party personal information about me/us/our dependent children for the purposes of determining or verifying initial or ongoing eligibility for RGI assistance.
3. I/we further consent to my/our personal information being collected from and/or disclosed to **Housing Provider Name**, its authorized representatives, Ontario Works, Ontario Disability Support Program, Ministry of Community and Social Services, or the Government of Canada, the government of any other municipality, region, province or territory, the Government of Ontario, or any agency, ministry or department of any of the foregoing, in order to determine or verify my/our initial or ongoing eligibility for RGI assistance.
4. This consent will apply to inquiries made regarding my/our initial, past, and ongoing eligibility for a rental housing subsidy.
5. I/we understand that the sharing of information permitted in this consent may be done electronically.
6. I/we understand that this consent applies as of the date below and to future disclosures unless I advise you otherwise in writing.

Signature of all household members who are sixteen (16) years or older

X _____ Signature Tenant/Member #1	X _____ Witness's Signature	_____ Date
X _____ Signature Tenant/Member #2	X _____ Witness's Signature	_____ Date
X _____ Signature Tenant/Member #3	X _____ Witness's Signature	_____ Date
X _____ Signature Tenant/Member #4	X _____ Witness's Signature	_____ Date

Notice with regard to the collection, use, disclose of personal information

Personal information contained on this form is collected under the authority of Ontario's *Housing Services Act, 2011* sections 57(6), 169(1) and (2), 170(1) (2), 171(1), (3) and (6) *Municipal Freedom of Information and Protection of Privacy Act* (R.S.O. 1990, c.M.56) and the *Federal Personal Information Protection and Electronic Documents Act* (S.C. 2000, c.5)

Withdrawing consent may result in loss of rental subsidy if initial and ongoing eligibility cannot be verified. Questions about this consent form may be referred to the Privacy Officer for Housing Provider Name (Position Title, Identifier), at Full Mailing Address.

Appendix A: Verification of Assets Guidelines

Assets and Verification Guidelines include, but are not limited to, the following:

Assets	Verification Guidelines
<p>Bank accounts Examples include:</p> <ul style="list-style-type: none"> • Savings accounts and chequing accounts • Tax-Free Savings Accounts (cash) • Overseas or foreign accounts 	<ul style="list-style-type: none"> • Current bank statement showing the account balance for all accounts
<p>Value of 2nd or more Personal Vehicle (the market value of the vehicle minus any amount owing)</p>	<ul style="list-style-type: none"> • Loan documents • Market value (Red Book value, online vehicle retailers)
<p>Investments Examples include:</p> <ul style="list-style-type: none"> • Stocks and bonds • Term Deposits • Guaranteed Investment Certificates • Mutual funds • Includes overseas or foreign investments • Tax-Free Savings Accounts (investments) 	<ul style="list-style-type: none"> • Current statement from bank/financial institution showing the amount of the investment • Copy of a stock certificate <p>NOTE: T5 and T3 tax slips document the income generated from investments. They do not include the investment amounts. They can however help validate the household's declared asset value (e.g., if the household declares 0 assets but has significant income from investments, further information is required)</p>
<p>Real estate equity (The value of the property as determined by the current MPAC assessment, minus the amount of any mortgage(s) owing and any balances owed on loans/lines of credit secured against the property)</p> <ul style="list-style-type: none"> • Includes residential and non-residential properties • Includes property in Canada and in other countries 	<ul style="list-style-type: none"> • MPAC assessment • Current mortgage statement • Home Equity Line of Credit (HELOC) statement
<p>Life insurance with a cash surrender value amount over \$100,000 for the household</p>	<ul style="list-style-type: none"> • Insurance policy that states the cash surrender value • Life insurance policy through an employer is a temporary insurance and should be excluded
<p>Business related assets Assets of a member of the household that are necessary to the operation of a business that a member operates or has an interest in and are not specifically excluded</p> <ul style="list-style-type: none"> • Business related bank accounts, vehicles, licenses, property, etc. 	<p>Documentation depends on type of asset</p> <ul style="list-style-type: none"> • Financial Statements • Income taxes • Will • Insurance documents
<p>The value of a Trust fund for any member of the household; or Trust fund for a person with a disability, over \$100,000</p> <ul style="list-style-type: none"> • The capital in the trust fund must come from an inheritance or a life insurance payment 	<ul style="list-style-type: none"> • Trust fund documents • Trust account bank statement showing the amount and beneficiary