

This document has important information about your rent subsidy. It is important you read and understand it. Please discuss any questions with your housing provider.

These rules determine if you are eligible for a rent subsidy. If you do not follow these rules, you may lose your rent subsidy and pay market rent for your unit.

FILING YOUR INCOME TAX RETURN

You must file an income tax return every year to keep your subsidy. If you do not complete your income tax return, you will lose your subsidy and pay market rent for your unit.

You and everyone living with you over the age of 18 who is not a full-time student must give a copy of your Canada Revenue Agency (CRA) Proof of Income Statement or Notice of Assessment to your housing provider as part of your annual review. This document will be used to calculate your rent.

A Proof of Income Statement is the preferred document to submit. You can get a copy online if you have a CRA account, or by calling 1-800-267-6999.

SOCIAL ASSISTANCE INCOME

If you receive benefits from Ontario Works (OW) or Ontario Disability Support Program (ODSP), you must provide a copy of your **most recent** payment details from MyBenefits or Statement of Assistance along with your Proof of Income Statement or Notice of Assessment.

When providing payment details from MyBenefits please make sure to include all payment amounts, including Basic Needs and Shelter, and list all household members who are part of the benefit unit.

STUDENT INCOME

Full-time student income is excluded from your rent calculation. A full-time student is someone attending a recognized educational institution taking at least 60% of a full course load, or 40% of a full course load if the student has a disability. Full-time students over the age of 18 must provide proof of full-time enrollment. See Appendix A for examples of documents.

CHANGES IN INCOME SINCE THE LAST TAX YEAR

If your income has changed significantly since the last tax year, a section is provided to report the change. Examples may include changing jobs, starting to receive social assistance, or beginning to receive pension income. In addition to your CRA Proof of Income Statement or Notice of Assessment, you must attach verification documents to show how your income has changed. See Appendix A for examples of documents.

REPORTING ASSETS

York Region has asset limits to be eligible for a rent subsidy, as follows:

- **\$75,000 if you started receiving a subsidy on or after October 1, 2018**
- **\$150,000 if you started receiving a subsidy before October 1, 2018**

If all members of your household are part of an OW or ODSP benefit unit, the asset limit does not apply to you, as OW and ODSP have their own asset limits and reporting requirements. You are not required to report assets or provide verification documents.

All other households are required to report and provide verification documents for all assets at move-in. At annual review, you must report all assets and provide verification documents for any new assets, or assets where the value has changed. While some assets do not count toward the asset limit, such as RRSPs, RESPs, and RDSPs, you are required to report all assets.

OWNING RESIDENTIAL PROPERTY

You cannot own a residential property (on your own or as a partial owner) in Canada or another country while receiving a rent subsidy. Examples of a residential property include a home, a condo or home you rent out, or a winterized cottage.

If you own residential property, you must sell your property within 180 days after you start receiving a rent subsidy or after you gained legal interest in the property, whichever is later. You may ask your housing provider for an extension if extenuating circumstances prevent you from selling your property.

REPORTING CHANGES BETWEEN ANNUAL REVIEWS

Outside of annual reviews, rent reviews will only happen when certain changes occur.

You must report the following changes to your housing provider between annual reviews, within 30 days of the change taking place:

- You or someone in your household starts to receive OW or ODSP benefits
- You or someone in your household has had their tax information reassessed by Canada Revenue Agency
- Someone permanently moves out of your household
- The status in Canada of someone in your household changes

If you want to add someone to your household, you must talk to your housing provider first so they can approve and verify the eligibility of the new household member.

You are not required to report increases in your income between annual reviews. Your housing provider will address any income increases at your next annual review.

You may request only one decrease in your rent between annual reviews if your total annual income has permanently decreased by 20% or more. You are required to provide proof of the income decrease. All other income decreases will be addressed at your next annual review.

BEING AWAY FROM YOUR UNIT

If you and all the people in your unit leave for 90 days in a row, you may lose your rent subsidy. If you think you need to be away for more than 90 days, talk to your housing provider about options before you leave.

PURSUIT OF INCOME

Depending on your circumstances, your housing provider may direct you to pursue income from the following sources:

- Financial assistance from Ontario Works
- Spousal or child support payments
- Unemployment benefits from Employment Insurance
- Government pensions or supplement (Old Age Security or Canada Pension Plan) and benefits for seniors from Ontario's Guaranteed Annual Income System (GAINS)
- Supports or maintenance promised under your immigration sponsorship agreement

HAVING MORE BEDROOMS THAN YOU NEED (OVERHOUSED)

York Region has rules that say how many bedrooms you are eligible for based on the number of people that live in your unit. If you have more bedrooms than you need, you are overhoused. If you are overhoused, you must transfer to a smaller unit within your housing community.

Your housing provider will send you a Notice of Decision letting you know you are overhoused. You will be added to the internal transfer list for the right sized unit. Your housing provider will offer you the right sized unit when one is vacant. After one year, if you refuse to move to the right size unit, you will lose your rent subsidy and will start to pay the market rent for your unit.

REQUESTING A DECISION REVIEW

Based on the information you provide, your housing provider makes decisions that affect your rent subsidy, including:

- If you are eligible for a rent subsidy
- Your rent subsidy amount
- What unit size and type you are eligible for, including if you are eligible for an accessible unit

If you disagree with your housing provider's decision, you can ask York Region to review the decision. Requests for review must be made within 15 days of the date on the housing provider's decision letter. Speak to your housing provider for more information.

FOR MORE INFORMATION

If you would like more information, please look at the Region's website site at york.ca/housing or contact your housing provider.

INSTRUCTIONS

This form is used to determine your eligibility for a rent subsidy. You must complete this form:

- ✓ When you are offered a subsidized unit
- ✓ Once a year at the time of annual rent subsidy review
- ✓ When you are reporting an in-year change (see cover sheet for a list of changes that must be reported)

Step 1: Complete this form in full. Do not skip any sections.

Step 2: Attach the following verification documents. See Appendix A for more information on verification documents.

- ✓ CRA Proof of Income Statement or Notice of Assessment for you and everyone who lives with you 18 and older who are not full-time students
- ✓ Proof of current income if your current income is very different from the income on your Proof of Income Statement or Notice of Assessment
- ✓ Copies of birth certificates, permanent residence or refugee claim documents if not already on file with your housing provider
- ✓ Current MyBenefits payment information or Statement of Assistance from OW or ODSP, including a breakdown of payments received (including basic needs and shelter amounts) and listing all household members who are part of the benefit unit, if you receive benefits from either program
- ✓ Proof of school enrollment for all full-time students 18 and older
- ✓ Documents showing any new assets anyone in your household has acquired since your last rent subsidy review or assets where the value has changed

Step 3: Ensure all members of your household 16 and older review and sign Section 4.

Step 4: Submit the completed form and verification documents to your housing provider by the due date in your annual review letter.

SECTION 1 – HOUSEHOLD INFORMATION

Housing provider name:

Name of primary household member (first name, last name)

Number of bedrooms in your unit Bachelor One Two Three Four

Street number Street name Unit number

City/Town Postal code

Primary phone number Email

WHO LIVES IN THE UNIT?

List all persons living in the unit, including yourself. For full-time students, enter the name of the school. Verification of enrollment is required for students 18 and older.

Name of household member (first name, last name)	Relationship to you	Gender	Date of birth (mm/dd/yy)	School attended, if applicable
	Self			

CHANGES IN YOUR HOUSEHOLD

Has anyone moved in or moved out of your unit in the last year? Yes No

If yes, did the person Move in Move out

Name of person (first name, last name)

Date person moved (mm/dd/yyyy)

ALTERNATE CONTACT INFORMATION

Please provide an alternate contact your housing provider or York Region can talk to about your subsidy.

Who is your alternate contact?

Your relationship to this person

Contact's phone number Email

SECTION 2 – INCOME INFORMATION (CONTINUED)

If you or any household members are receiving Canada Disability Benefit (CDB) payments, please fill out the section below.

Important: Canada Disability Benefit payments are not counted towards total household income but must be reported to ensure accuracy of rent benefit calculation.

Name of Household Member receiving CDB payments	Annual Amount

REGISTERED DISABILITY SAVINGS PLAN

Does anyone in your household have a Registered Disability Savings Plan? Yes No

INCOME CHANGES SINCE THE LAST TAX YEAR

Has your income changed significantly from the previous tax year? Yes No

If yes, please attach documents that show your current income (See Appendix A).

Why has your income changed since the previous tax year? Explain and provide your current monthly income before taxes. For example, "I started to receive Ontario Works, pension, or started a new job and my monthly income before taxes is \$1,500".

SECTION 3 - ASSET INFORMATION

You are not required to complete this section if **all members** of your household are part of an OW or ODSP benefit unit.

All other households are required to complete this section, including households where some members belong to an OW or ODSP benefit unit. Complete the following table for everyone age 16 and older, including assets owned with someone else. Assets include savings, investments, or property you own in or outside Canada.

At move-in, you must report all assets and provide verification documents. At annual review, report all assets and provide verification documents only for new/changed assets since your last annual review. See Appendix A for more information.

Name of household member (first name, last name)	Asset/ Investment Type	Name of Financial Institution/Bank	Value (\$)	Verification document attached
Mary Smith	RRSP	TD Bank	\$19,000	

Are there any assets that you or someone in your household owned that you have gotten rid of in the last three years? Yes No

If yes, what assets do you no longer own, what is their value and why do you no longer own them?

SECTION 4 – RELEASE, CONSENT AND DECLARATION

Please read the following carefully before signing:

- A. I agree that York Region may collect, use, and share personal information provided by me for the purpose of:
 - i. determining if I am eligible to receive housing benefits offered by York Region or housing benefits offered by York Region on behalf of a government agency or ministry; and/or
 - ii. evaluating the quality of housing services offered by York Region or offered by York Region on behalf of a government agency or ministry to determine if the services can be improved.
- B. I understand that my personal information can be shared, in accordance with law, for the purpose of determining my eligibility for benefits under the Ontario Works Act, 1997, the Ontario Disability Support Program Act, 1997 and the Child Care and Early Years Act, 2014 as applicable, within York Region’s Community and Health Services Department and government agencies/ministries responsible for overseeing programs under these laws.

SECTION 4 – RELEASE, CONSENT AND DECLARATION CONTINUED

C. I agree that my information can be shared, in accordance with law, to a provincial or federal government agency or ministry, as applicable, that administers, enforces or conducts research relating to the Taxation Act, 2007, the Income Tax Act, 1990 the Income Tax Act (Canada), 1985, or the Immigration and Refugee Protection Act (Canada), 2001.

D. I understand that the laws that permit York Region to collect and share my personal information include the Municipal Freedom of Information and Protection of Privacy Act, 1990, the Municipal Act, 2001, the Housing Services Act, 2011, and the Ontario Works Act, 1997.

E. I understand that if I have any questions about York Region’s collection and sharing of my personal information, I can speak to the following person to get answers:

Manager, Housing Programs
 1-877-464-9675 ext. 72062
 The Regional Municipality of York
 17150 Yonge St
 Newmarket ON L3Y 8V3

F. I have been provided a copy of and understand the rules of my rent subsidy.

G. I know that the information I have provided on this form will be used by York Region to determine if I am eligible to receive housing benefits.

H. I confirm that all of the information on this form is true and that I have not left any important information out.

I. I confirm that the income information that I have provided is true for everyone in my household 16 years of age or older and I have not left any income out

J. I confirm that the asset information that I have provided is true for everyone in my household 16 years of age or older and I have not left any assets out. My household assets are less than the applicable limit for my household of \$75,000 if I started receiving a subsidy on or after October 1, 2018, or \$150,000 if I started receiving a subsidy before October 1, 2018.

K. I understand, and agree, that if York Region determines that the information on this form is not true York Region can stop my benefits and services and can make me pay York Region back.

L. The Region will from time to time, audit tenant files to check the accuracy of the information included in this form.

Signatures of household members 16 years of age and older:

Household member (last, first name)	Signature	Date (mm/dd/yyyy)

APPENDIX A – INCOME AND ASSET VERIFICATION DOCUMENTS

Income Type	Required Verification Documents
<ul style="list-style-type: none"> • Employment (full-time, part-time, casual) • Commissions, overtime pay, vacation pay, bonuses, etc. • Employment Insurance (EI) • Old Age Security (OAS), Guaranteed Income Supplement (GIS), Guaranteed Annual Income System (GAINS) • Canada Pension Plan (CPP) and any other pension income (private, company, foreign, military) • Workers Safety Insurance Board (WSIB) payments • Disability pay, sickness pay, long-term income protection plan 	<ul style="list-style-type: none"> • Canada Revenue Agency Notice of Assessment (NOA) or Proof of Income Statement
<p>Self-employment</p>	<ul style="list-style-type: none"> • Canada Revenue Agency Notice of Assessment or Proof of Income Statement • If within the first year of self-employment, signed affidavit and/or financial statements • Statement of Business or Professional Activities as part of personal income tax return
<p>Full-Time Student</p>	<ul style="list-style-type: none"> • If applicable, copy of Ontario Student Assistance Program (OSAP) assessment sheet • If no OSAP applies, letter from school registrar confirming full-time enrolment
<p>Social Assistance Benefits</p> <ul style="list-style-type: none"> • Ontario Works (OW) • Ontario Disability Support Plan (ODSP) 	<ul style="list-style-type: none"> • Canada Revenue Agency NOA or Proof of Income Statement • Most recent statement of assistance from OW or ODSP or payment details from MyBenefits <ul style="list-style-type: none"> • Payment details from MyBenefits must include breakdown of payments received (including basic needs and shelter amounts) and list all household members who are part of the benefit unit
<p>Registered Disability Support Plan (RDSP) payments and repayments</p>	<ul style="list-style-type: none"> • Canada Revenue Agency NOA or Proof of Income Statement • If you made RDSP repayments, letter from the financial institution that issued the RDSP showing repayments (e.g. bank or investment company)
<p>If you think your current monthly income is significantly different from your most recent tax return, or your income has changed in the last 12 months, you must provide proof of your current income along with your Canada Revenue Agency Notice of Assessment or Proof of Income Statement.</p>	<ul style="list-style-type: none"> • Pay stubs or letter from employer showing gross income • Service Canada statement for OAS, GIS, CPP or EI • Statements from the source of income for WSIB, private pensions, insurance benefits, etc. <p>Note: Your housing provider may request additional information</p>

APPENDIX A – INCOME AND ASSET VERIFICATION DOCUMENTS CONTINUED

Some of the assets listed below are not counted toward the asset limit, but you must report all assets, unless all members of your household belong to an OW or ODSP benefit unit.

Asset Type	Required Verification Documents
Bank accounts <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 • Current passbook entry showing the account balance for all accounts
Investments <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
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 balance owed on loans/lines of credit secured against the property) <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"> • Current MPAC assessment or appraisal • Current mortgage statement • Home Equity Line of Credit (HELOC) statement
Registered accounts/investments <ul style="list-style-type: none"> • Registered Disability Savings Plan (RDSP) • Registered Retirement Savings Plan (RRSP) • Registered Retirement Income Fund (RRIF) • Locked-in Retirement Account (LIRA) • Locked-in Income Fund (LIF) • Registered Education Savings Plan (RESP) 	<ul style="list-style-type: none"> • Current bank statement showing value of the account, ownership and beneficiary
Life insurance	Insurance policy that states the cash surrender value
Prepaid funeral	Contract with insurance company or service provider
Business assets <ul style="list-style-type: none"> • Business bank accounts • Business property • Business vehicle 	<ul style="list-style-type: none"> • Documentation depends on type of asset
<ul style="list-style-type: none"> • Trust funds • Personal Trusts • Family Trusts • Spousal Trusts 	<ul style="list-style-type: none"> • Will • Insurance documents • Trust fund documents • Trust account bank statement showing the amount and beneficiary

This document is available with communications supports upon request.