**Annual RGI Review Overview**

Rent-Geared-to-Income (RGI) rent is calculated using the Net Income for each member of the household, as reported on their Notices of Assessment (NOA) for the applicable taxation year. To continue to be eligible to receive RGI assistance, all members of your household that are:

* 16 years of age and older, and does not qualify as full-time student\*, must file an income tax return every year. Copies of the applicable Notices of Assessment for each of these household members must be submitted with the completed Annual Household RGI Review form
* 16 years of age and older must declare all assets that are not exempt on the attached Annual Household Asset Declaration Form

**So that your annual RGI review can be completed, you must complete and/or return the following to [who and where] by [date]:**

* Annual Household Income Review form (see below)
* Copies of the applicable Notice of Assessment for each member of the household who is 16 years of age and older, and does not qualify as full-time student, for [insert relevant taxation year]
* Consent and Declaration form (see attached)
* Annual Household Asset Declaration Form (see attached)

If any member of your household is in receipt of Social Assistance, the following must also be submitted:

* a recent Statement of Assistance that has the names of all household members included in the benefit, the benefit unit's address and the net social assistance amount paid to the benefit unit (or a copy of the proof of social assistance from the recipients' MyBenefits account)
* if receiving CPP-D, a T4A(P) for [insert relevant taxation year]
* if receiving OAS Spouse's Allowance, a T4A(OAS) for [insert relevant taxation year]

If at least one member of your household received employment income during the relevant tax year, you will qualify for an employment deduction. To receive the employment deduction, you must provide **one** of the following verification documents for the same taxation year as the applicable Notice of Assessment of a household member who received employment income:

* Proof of Income statement
* T4
* Letter from employer
* Pay stub
* Proof of Wage-loss replacement/Loss of Earnings benefits from WSIB

If any member of your household is a full-time student at a recognized primary, secondary or post-secondary institution, any non-benefit income they have will not be included in the calculation of the RGI rent.

If any member(s) of your household has a Registered Disability Savings Plan (RDSP), the following must also be submitted:

* annual RDSP statement for the same tax year as their NOA from the institution holding the investment.

As recipients of RGI assistance, you are not required to report most in-year increases in your household income. **However, you must report to [the RGI Administrator] within 30 days if:**

* There is any change in your household composition (this is who lives in your household).
* Any member of your household has ceased to be a full-time student.
* Any member of your social assistance benefit unit (OW or ODSP) had a permanent increase in income that caused the benefit unit's non-benefit income to exceed their non-benefit income limit.
* Any member of your household has started or stopped receiving social assistance, such as OW or ODSP.
* Any member of your household has had their income taxes reassessed or additionally assessed and received a revised Notice of Assessment.

**Note:** Any household member who has not signed the lease, but whose income is considered in the RGI rent calculation, does **not** have full tenancy rights.

**If, between now and your next annual RGI review, any member of your household has experienced a serious long-term event\*\* which has resulted in your household's total net income dropping by at least 20%, you may contact [RGI Administrator] to request an In-year Review.**

**\* Full-time student** is a student attending a recognized educational institution who is taking at least 60% of a full course load, as determined from the course calendar of the educational institution, or at least 40% of a full course load in the case of a student with a permanent disability.

**\*\* Serious long-term event** is an event that lasts a minimum of six (6) months, resulting from a change in one household member's source of income and in a significant reduction (at least 20%) in the net income of the household. Examples of such events include job loss, a permanent change from full- to part-time hours, or a change of status from employed to social assistance or retirement.

**Annual Household Income Review Form**

Please complete this form for all members of your household.

## Part 1: Household Information

|  |  |
| --- | --- |
| **Address (number and street name):** |  |
| **Apartment or unit number:** |  |
| **Postal code:** |  |
| **Number of people in your household:** |  |
| **Number of bedrooms in your unit:** |  |
| **Daytime phone number:** |  |
| **Alternative phone number:** |  |
| **Email address:** |  |

**Part 2: Household Member Information**

**Complete this information for EACH member of your household**. Include everyone who lives in your unit. Start with yourself.

|  |  |
| --- | --- |
| **Household Member #1 (the person completing this form)** | |
| **Last Name:** |  |
| **First Name:** |  |
| **Date of Birth:** (DD/MMM/YYY) |  |
| **Gender:** (male, female, non-binary, prefer not to answer) |  |
| **Status in Canada:** (Canadian Citizen/  Permanent Resident/  Convention Refugee/ Refugee Claimant) |  |
| **Full-time student?** | Yes No |
| **Does this person have employment income?** | Yes No |
| **Is this person receiving Social Assistance?** | Yes No |
| **Is a copy of this person's Notice of Assessment included?** | Yes No |
| **If the Notice of Assessment is not included, why not?** |  |
| **Does this person owe any money from a former social housing tenancy in Ontario for:**   * **arrears of rent,** * **paid a lower subsidized rent than the household was entitled to, or** * **damages they or their guest caused** | Yes No |
| **Is any other required documentation included?** | Yes No |
| **Household Member #2** | |
| **Last Name:** |  |
| **First Name:** |  |
| **Date of Birth** (DD/MMM/YYY)**:** |  |
| **Gender** (male, female, non-binary, prefer not to answer)**:** |  |
| **Relationship to Member #1:** |  |
| **Status in Canada** (Canadian Citizen /  Permanent Resident /  Convention Refugee / Refugee Claimant)**:** |  |
| **Full-time student?** | Yes No |
| **Does this person have employment income?** | Yes No |
| **Is this person receiving Social Assistance?** | Yes No |
| **Is a copy of this person's Notice of Assessment included?** | Yes No |
| **If the Notice of Assessment is not included, why not?** |  |
| **Does this person owe any money from a former social housing tenancy in Ontario for:**   * **arrears of rent,** * **paid a lower subsidized rent than the household was entitled to, or damages they or their guest caused** | Yes No |
| **Is other required documentation included?** | Yes No |
| **Household Member #3** | |
| **Last Name:** |  |
| **First Name:** |  |
| **Date of Birth** (DD/MMM/YYY)**:** |  |
| **Gender** (male, female, non-binary, prefer not to answer)**:** |  |
| **Relationship to Member #1:** |  |
| **Status in Canada** (Canadian Citizen /  Permanent Resident /  Convention Refugee / Refugee Claimant)**:** |  |
| **Full-time student?** | Yes No |
| **Does this person have employment income?** | Yes No |
| **Is this person receiving Social Assistance?** | Yes No |
| **Is a copy of this person's Notice of Assessment included?** | Yes No |
| **If the Notice of Assessment is not included, why not?** |  |
| **Does this person owe any money from a former social housing tenancy in Ontario for:**   * **arrears of rent,** * **paid a lower subsidized rent than the household was entitled to, or damages they or their guest caused** | Yes No |
| **Is other required documentation included?** | Yes No |
| **Household Member #4** | |
| **Last Name:** |  |
| **First Name:** |  |
| **Date of Birth** (DD/MMM/YYY)**:** |  |
| **Gender** (male, female, non-binary, prefer not to answer)**:** |  |
| **Relationship to Member #1:** |  |
| **Status in Canada** (Canadian Citizen /  Permanent Resident /  Convention Refugee / Refugee Claimant)**:** |  |
| **Full-time student?** | Yes No |
| **Does this person have employment income?** | Yes No |
| **Is this person receiving Social Assistance?** | Yes No |
| **Is a copy of this person's Notice of Assessment included?** | Yes No |
| **If the Notice of Assessment is not included, why not?** |  |
| **Does this person owe any money from a former social housing tenancy in Ontario for:**   * **arrears of rent,** * **paid a lower subsidized rent than the household was entitled to, or damages they or their guest caused** | Yes No |
| **Is other required documentation included?** | Yes No |
| **Household Member #5** | |
| **Last Name:** |  |
| **First Name:** |  |
| **Date of Birth** (DD/MMM/YYY)**:** |  |
| **Gender** (male, female, non-binary, prefer not to answer)**:** |  |
| **Relationship to Member #1:** |  |
| **Status in Canada** (Canadian Citizen /  Permanent Resident /  Convention Refugee / Refugee Claimant)**:** |  |
| **Full-time student?** | Yes No |
| **Does this person have employment income?** | Yes No |
| **Is this person receiving Social Assistance?** | Yes No |
| **Is a copy of this person's Notice of Assessment included?** | Yes No |
| **If the Notice of Assessment is not included, why not?** |  |
| **Does this person owe any money from a former social housing tenancy in Ontario for:**   * **arrears of rent,** * **paid a lower subsidized rent than the household was entitled to, or damages they or their guest caused** | Yes No |
| **Is other required documentation included?** | Yes No |
| **Household Member #6** | |
| **Last Name:** |  |
| **First Name:** |  |
| **Date of Birth** (DD/MMM/YYY)**:** |  |
| **Gender** (male, female, non-binary, prefer not to answer)**:** |  |
| **Relationship to Member #1:** |  |
| **Status in Canada** (Canadian Citizen /  Permanent Resident /  Convention Refugee / Refugee Claimant)**:** |  |
| **Full-time student?** | Yes No |
| **Does this person have employment income?** | Yes No |
| **Is this person receiving Social Assistance?** | Yes No |
| **Is a copy of this person's Notice of Assessment included?** | Yes No |
| **If the Notice of Assessment is not included, why not?** |  |
| **Does this person owe any money from a former social housing tenancy in Ontario for:**   * **arrears of rent,** * **paid a lower subsidized rent than the household was entitled to, or damages they or their guest caused** | Yes No |
| **Is other required documentation included?** | Yes No |
| **Household Member #7** | |
| **Last Name:** |  |
| **First Name:** |  |
| **Date of Birth** (DD/MMM/YYY)**:** |  |
| **Gender** (male, female, non-binary, prefer not to answer)**:** |  |
| **Relationship to Member #1:** |  |
| **Status in Canada** (Canadian Citizen /  Permanent Resident /  Convention Refugee / Refugee Claimant)**:** |  |
| **Full-time student?** | Yes No |
| **Does this person have employment income?** | Yes No |
| **Is this person receiving Social Assistance?** | Yes No |
| **Is a copy of this person's Notice of Assessment included?** | Yes No |
| **If the Notice of Assessment is not included, why not?** |  |
| **Does this person owe any money from a former social housing tenancy in Ontario for:**   * **arrears of rent,** * **paid a lower subsidized rent than the household was entitled to, or damages they or their guest caused** | Yes No |
| **Is other required documentation included?** | Yes No |
| **Household Member #8** | |
| **Last Name:** |  |
| **First Name:** |  |
| **Date of Birth** (DD/MMM/YYY)**:** |  |
| **Gender** (male, female, non-binary, prefer not to answer)**:** |  |
| **Relationship to Member #1:** |  |
| **Status in Canada** (Canadian Citizen /  Permanent Resident /  Convention Refugee / Refugee Claimant)**:** |  |
| **Full-time student?** | Yes No |
| **Does this person have employment income?** | Yes No |
| **Is this person receiving Social Assistance?** | Yes No |
| **Is a copy of this person's Notice of Assessment included?** | Yes No |
| **If the Notice of Assessment is not included, why not?** |  |
| **Does this person owe any money from a former social housing tenancy in Ontario for:**   * **arrears of rent,** * **paid a lower subsidized rent than the household was entitled to, or damages they or their guest caused** | Yes No |
| **Is other required documentation included?** | Yes No |

**This completed Annual Household Income Review form, the completed Annual Household Asset Declaration Form and the completed Consent & Declaration form must be returned with all necessary verification documents to [the RGI Administrator] at [where] by [date].**

**If this form and the required verification documents are not submitted by the deadline, you could lose your eligibility for RGI assistance and you will have to pay market rent.**

If you have any questions or need help filling out this form, please call [the RGI Administrator] at [phone number].