**Annual RGI Review Overview**

Each year, Notices of Assessment (NOA) for the applicable taxation year are used to verify RGI eligibility and, in most cases, calculate Rent-Geared-to-Income (RGI) rent. All members of your household who are 16 years of age and older, and do not qualify as a full-time student\*, must file an income tax return every year.

**Your household must complete the following and return them to [who and where] by [date]:**

* Annual Household Income Review Form (see attached)
* Copies of the [insert applicable taxation year] 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\*
* Consent and Declaration for RGI Review (see attached)
* Annual Household Asset Declaration Form (see attached)

If any member of your household is in receipt of assistance from Ontario Works (OW) or Ontario Disability Support Program (ODSP) the following must also be submitted:

* a recent Statement of Assistance that has the names of all household members included in the benefit unit, 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 showing the same details)
* if receiving CPP-D, a T4A(P) for [insert applicable taxation year]
* if receiving OAS Spouse’s Allowance, a T4A(OAS) [insert applicable taxation year]

If at least one member of your household received employment income during the [insert applicable taxation year] tax year, they will qualify for an employment deduction. To receive the employment deduction, they must provide **one** of the following verification documents for [insert applicable taxation year]:

* Proof of Income statement
* T4
* Letter from employer
* Pay stub
* Proof of Wage-loss replacement/Loss of Earnings benefits from Workplace Safety and Insurance Board (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 [insert applicable taxation year] 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 (OW or ODSP).
* Any member of your household has had their income taxes reassessed and received a revised Notice of Assessment.

**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 can 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.

Documentation required for proof of full-time student status:

* for secondary school, one of the following –
  + a letter from the principal or registrar, or
  + a certified timetable
* for post-secondary institutions, one of the following –
  + a document from a funding agency (OSAP) that outlines the name of the educational institution and the number of courses the student is taking, or
  + a confirmation of enrolment prepared by an educational institution, or
  + a receipt from the educational institution showing the tuition fees paid

**\*\* 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 is a significant reduction (at least 20%) in the household’s total net income. 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.

**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. Contact your RGI administrator if you wish to have a member of your household who is 16 years of age and older added to the lease.

**Annual RGI Review Form**

Please complete this form for all members of your household.

## Part 1: Your 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/MM/YYYY) |  |
| **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/MM/YYYY)**:** |  |
| **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/MM/YYYY)**:** |  |
| **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/MM/YYYY)**:** |  |
| **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/MM/YYYY)**:** |  |
| **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/MM/YYYY)**:** |  |
| **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/MM/YYYY)**:** |  |
| **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/MM/YYYY)**:** |  |
| **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 for RGI Review 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] or email at [RGI Administrator email address].