The Agency for Co-operative Housing
L'Agence des coopératives d'habitation

Guide to Online Rent Supplement Claims

September 2018

Table of Contents

Overview 1
General Steps to Follow 2
STEP 1: Logging in 2
STEP 2: Updating Housing Charges 3
STEP 3: Updating Utilities 5
First year only 5
Mid-year Changes 6
Second and subsequent years 7
STEP 4: Entering Co-op Units 8
First year only 8
Second and subsequent years 9
Changing the order of the list 9
STEP 5: Entering Initial Household Information 10
Effective Date 11
Household Information 12
Income Information 13
Unit Information 16
STEP 6: Entering Changes 18
Scenario 1: The household composition changes 18
Scenario 2a: A household moves out with no immediate move-in 22
Scenario 2b: A household moves out with an immediate move-in 25
Scenario 3: A new household moves into a unit 26
Scenario 4: A second family moves into a unit 26
Scenario 5 A family unit moves out of a unit that has multiple families 27
Scenario 6: One of the parents from a two-parent family moves out 30
Scenario 7: A secondary occupant with income is added 35
Scenario 8: Internal move of RS household 35
Scenario 9: Mid-month moves 35
STEP 7: Annual Reconciliation 36
General Information 37
RS Households Page 38
RS Units Page 39
Rent Supplement Reports 39

OVERVIEW

The Agency's On-line Rent Supplement Claims System (RS System) replaces Forms A & B for all fiscal years ending July 2017 or later.

Using a secure link sent to you each year by the Agency, you file your co-op's annual RS Claim on-line. Apart from your staff, only your auditor and the Agency have access to your rent supplement information.

The RS Claim must be submitted two months after your fiscal year-end and includes updates to housing-charge information for the new fiscal year.

As a best practice, we suggest you enter changes on an ongoing basis, but you can enter all changes at the end of the year.

Once you submit your annual RS Claim, it is combined with your Annual Information Return (AIR) and the information is reviewed by the Agency and your auditor.

The RS System produces reports for ongoing tracking and reconciling with the co-op's finances.

This User Guide, along with on-line tutorial videos explain the on-line system. The **Rent Supplement Program Guide** describes Rent Supplement program rules that accompany the new 2017 Rent Supplement Agreements.

Over time, the guide may be updated. Please remember to check on line for the most recent version. If you have a printed copy of the guide, be sure to compare the date on the cover page with the one showing on line to see if your hard copy is current.

For help with the RS System please contact:

Trina Murphy, Rent Supplement Co-ordinator
Telephone: 866-660-3140 / 416-598-4464 ext.640
Email: tmurphy@agency.coop

Before you start:

Please review this User Guide before entering information in the system.

You can also view a tutorial video on how to:

» Log in

» Enter information for the first time on units, housing charges, utilities and households

» Update information previously entered

» Submit a rent supplement claim and view reports

General Steps to Follow

1. Log in to the system (Step 1) and – in the first year only – enter basic information on all your co-op units including housing charges, utility allowances and utility charges, as well as the address for each unit. The system opens directly to **Housing Charges**, which you must complete before accessing the rest of the system. (Steps 2-4). Since you can access more than one claim at a time make sure you select the correct year.
2. Enter information on households receiving rent supplement assistance. (Step 5)
3. Enter changes throughout the year as they happen or at the end of the fiscal year before submitting the annual claim and reconciliation. (Step 6)
4. Verify that the information entered in the system for the year also matches with your records and make corrections as necessary.
5. Once you are satisfied that the information is correct, submit the annual claim and reconciliation. (Step 7)

   Going forward, enter only co-op wide changes (e.g. housing charges) or changes specific to a unit or a household (e.g. moves, income changes).

STEP 1: Logging in

Log into to the RS System using the link in the AIR and Rent Supplement Reminder letter, sent one month before the end of your fiscal year from the Agency and enter the same username and password your co-op uses to access the Agency's client website. If you don't have the username and password, contact your relationship manager. Only authorized staff should have access to the RS System as it contains confidential information.

1. Select co-op (applies only to management companies).
2. Click **Go To** for the **Year** and **Program** you want to access.

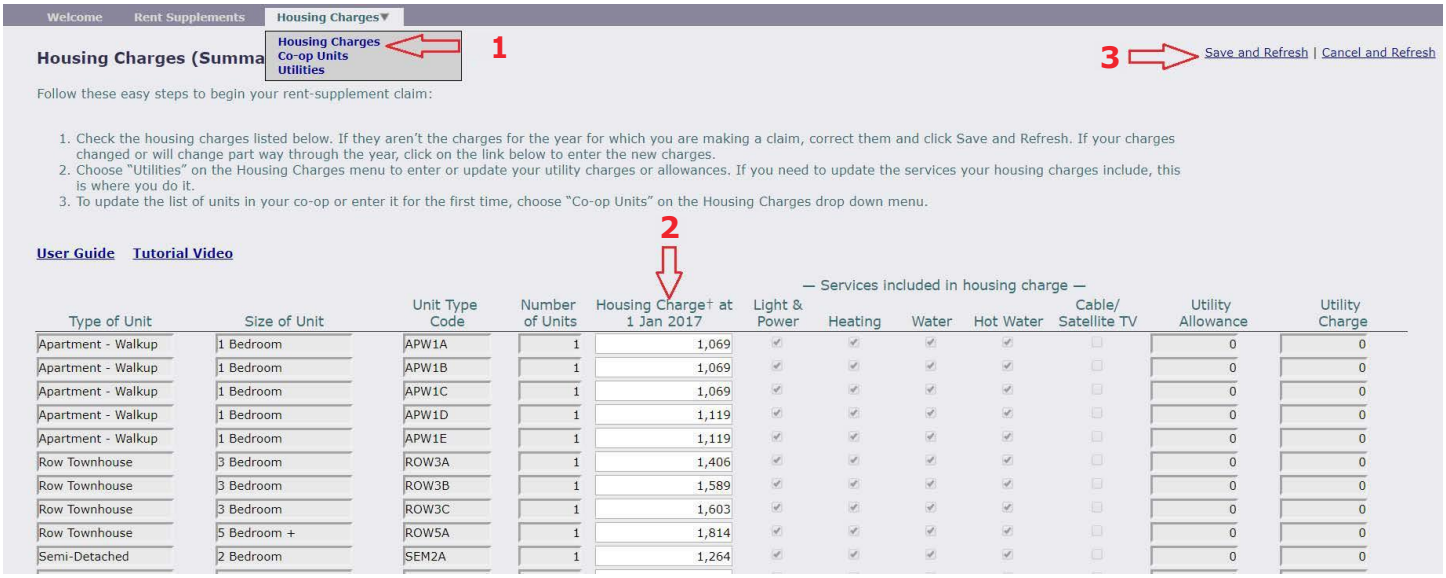
STEP 2: Updating Housing Charges

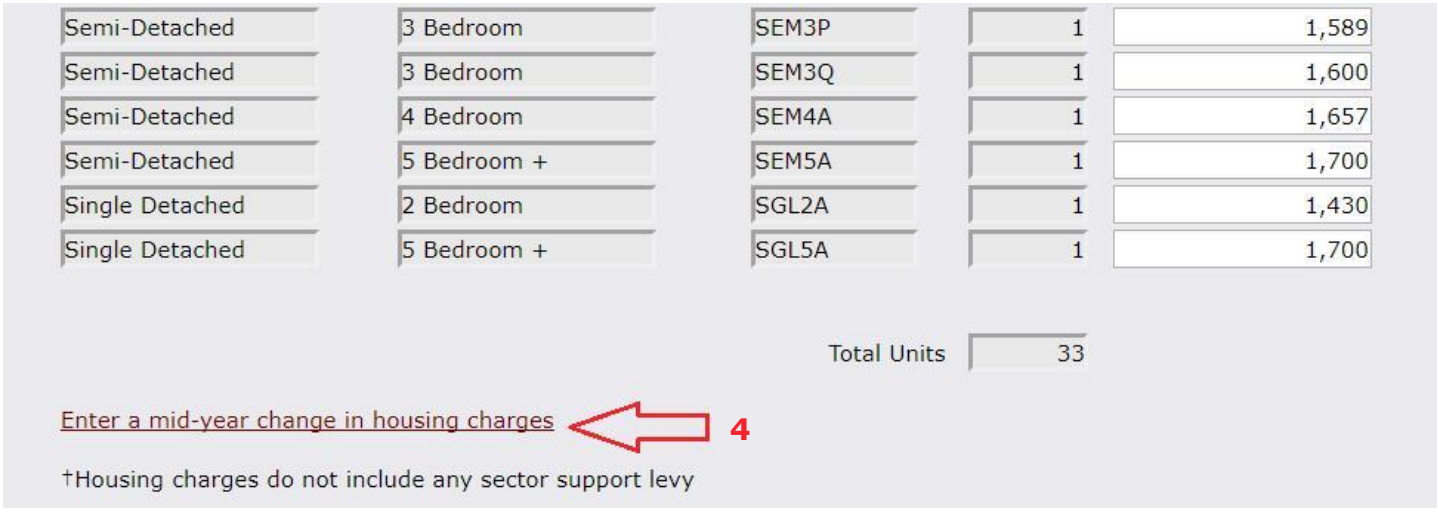
1 Select **Housing Charges** from the **Housing Charges** drop down menu.

2 Update the housing charges listed on the page by clicking on the amount in the **Housing Charge** column and entering the housing charges at the beginning of the current fiscal year.

3 When you have updated all the housing charges click **Save and Refresh**.

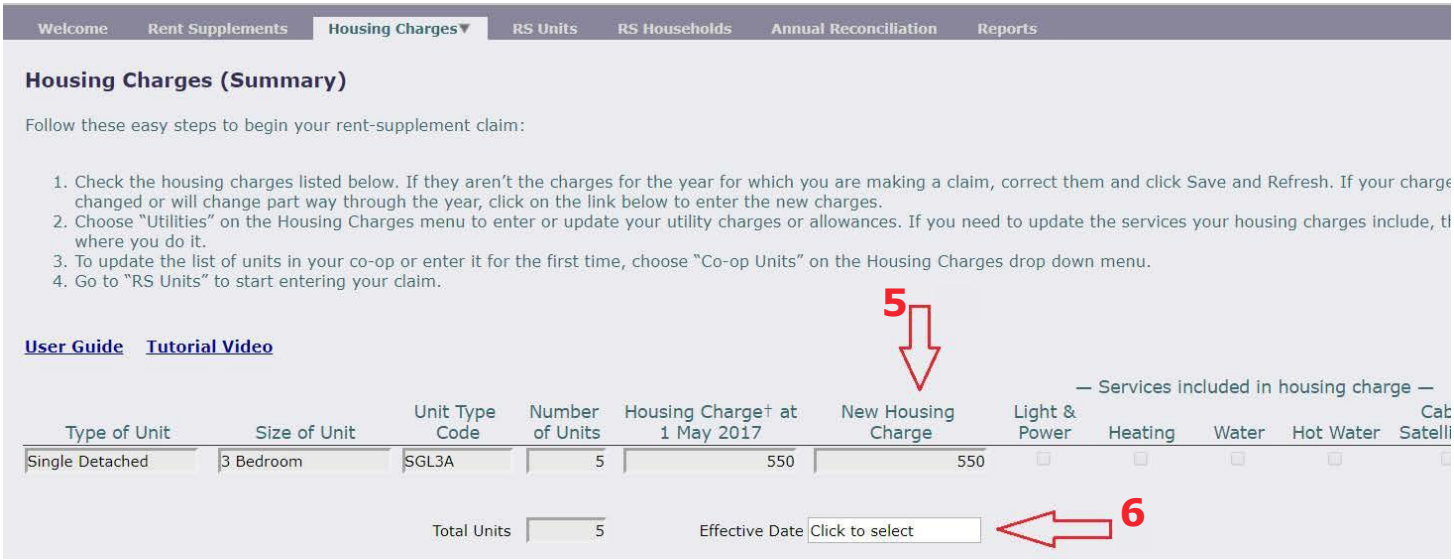
4 If there is a mid-year change in housing charges click **Enter a mid-year change in housing charges** (at the bottom of the page).

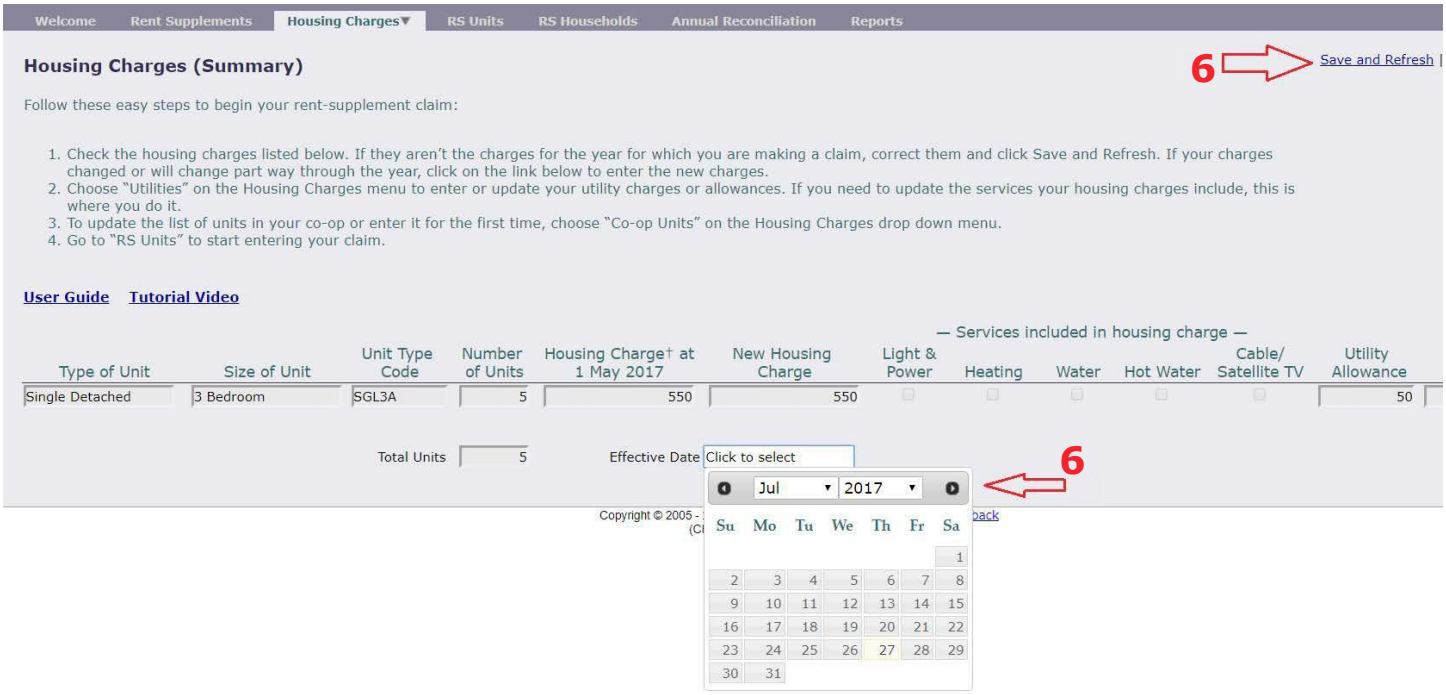




5 A new column will appear called **New Housing Charge**.

6 Enter the **Effective Date** (“Click to select” at the bottom of the screen) and the new housing charges and click **Save and Refresh** (top right corner).





STEP 3: Updating Utilities

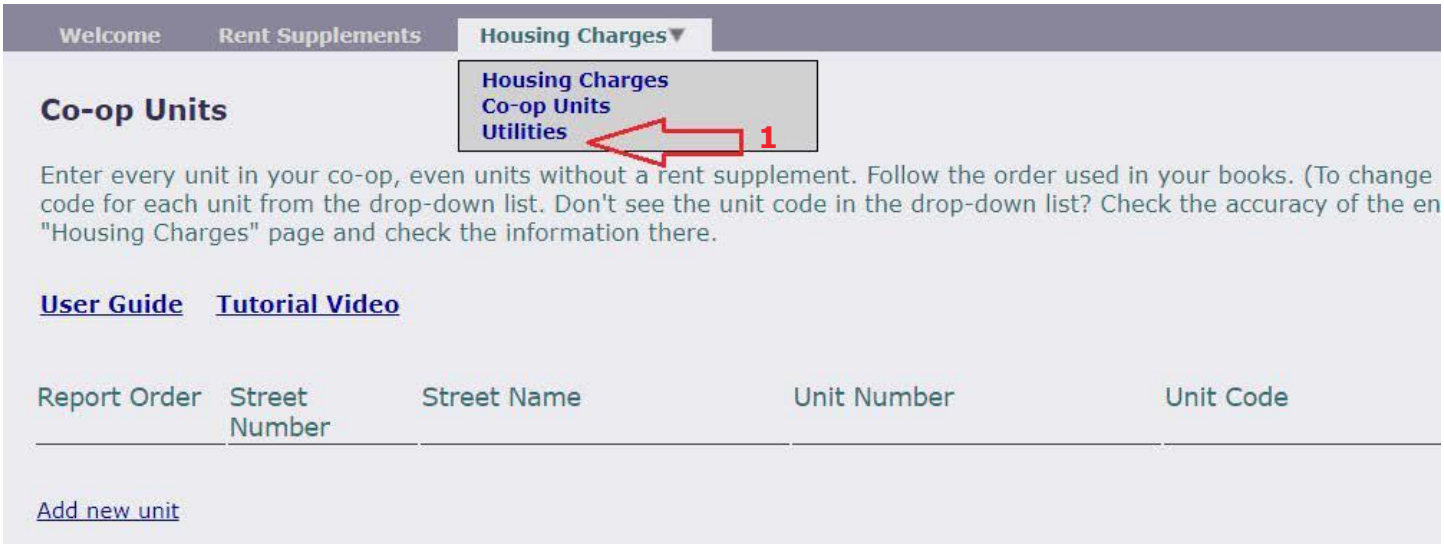
First year only:

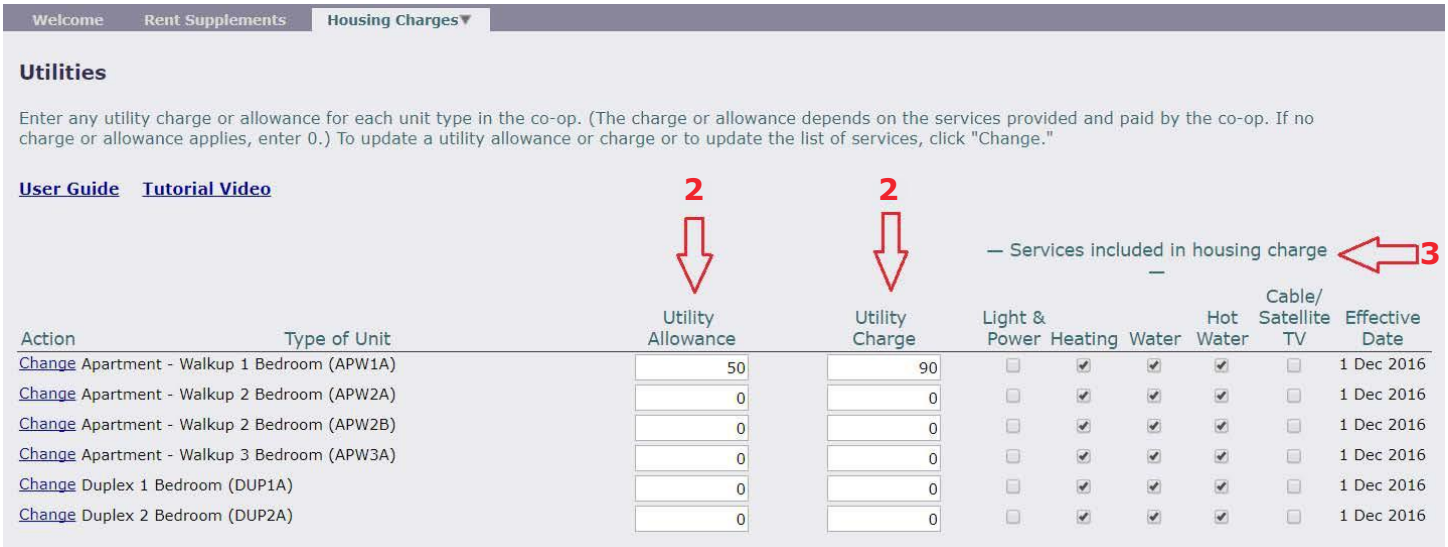
1 Choose **Utilities** in the **Housing Charges** drop-down menu.

2 Enter the **Utility Allowance** and **Utility Charge** for each unit type (the charge or allowance depends on the services provided and paid for by the co-op). Enter the values that were in effect at the beginning of the fiscal year. Where no charge or allowance applies, enter 0.

3 As necessary, update **Services included in housing charge** by clicking on the boxes.

4 Click **Save and Refresh** when all the amounts are entered (top right corner).





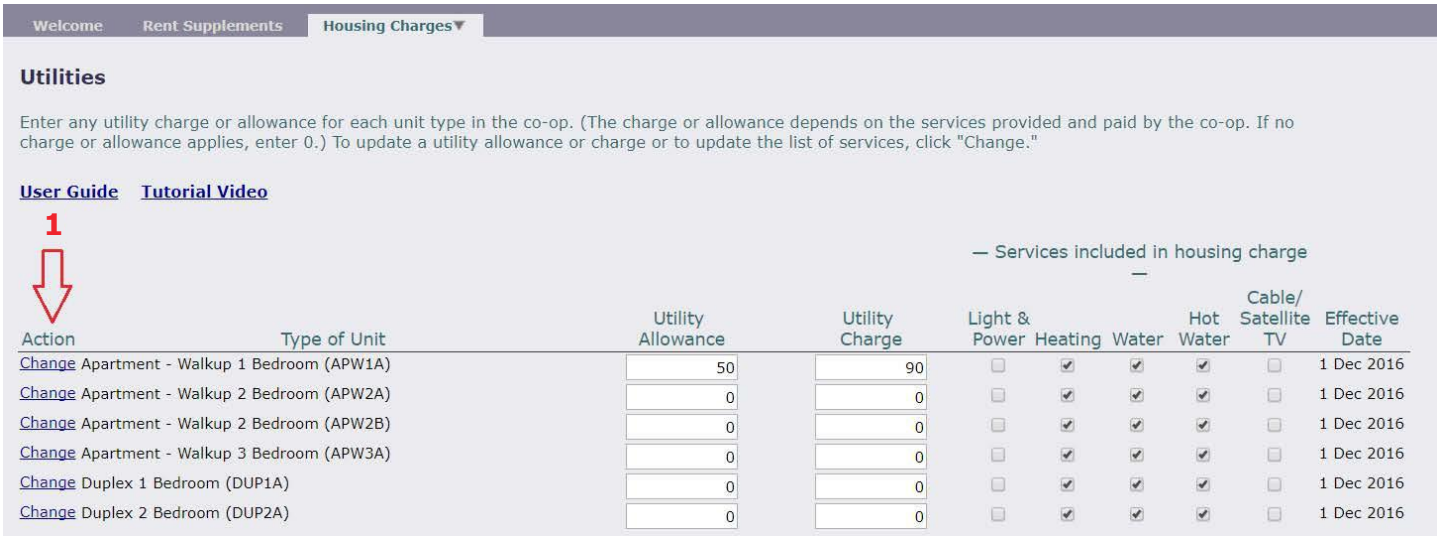
Mid-year Changes:

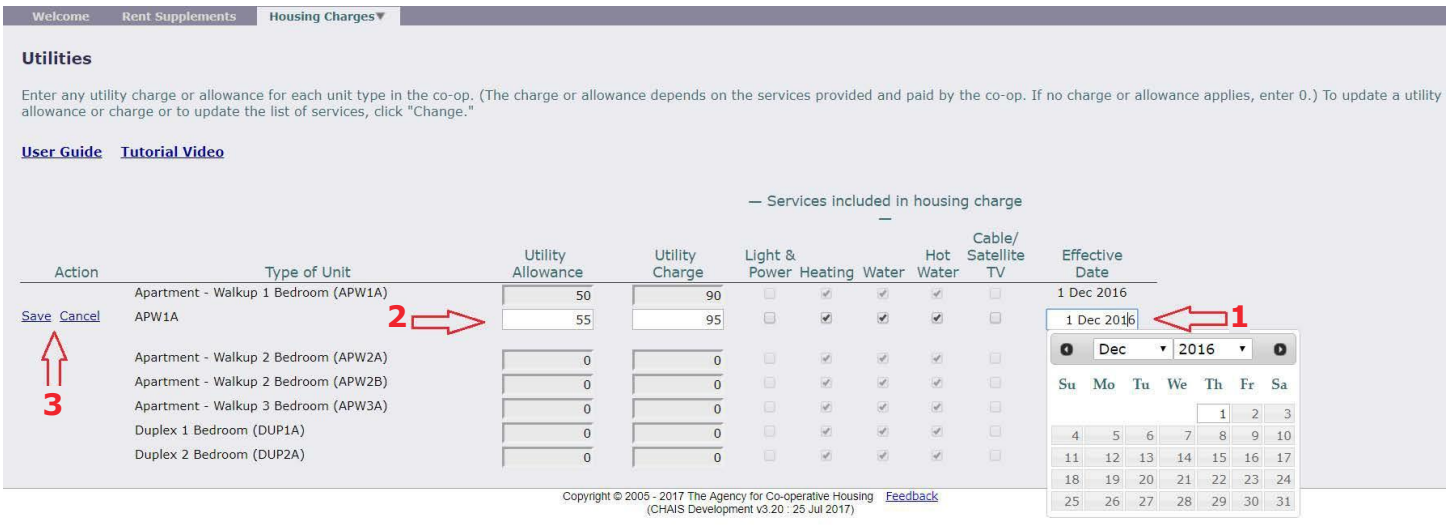
1 If there was a mid-year change, click **Change** under the **Action** column on the left and enter the **Effective Date** in the pop-up calendar.

2 Update the **Utility Allowance** and **Utility Charge** and/or **Services included in housing charge** for each unit-type.

3 Click **Save** (or Cancel if you make a mistake).

4 Click **Save and Refresh** when all the amounts are entered (top right corner).



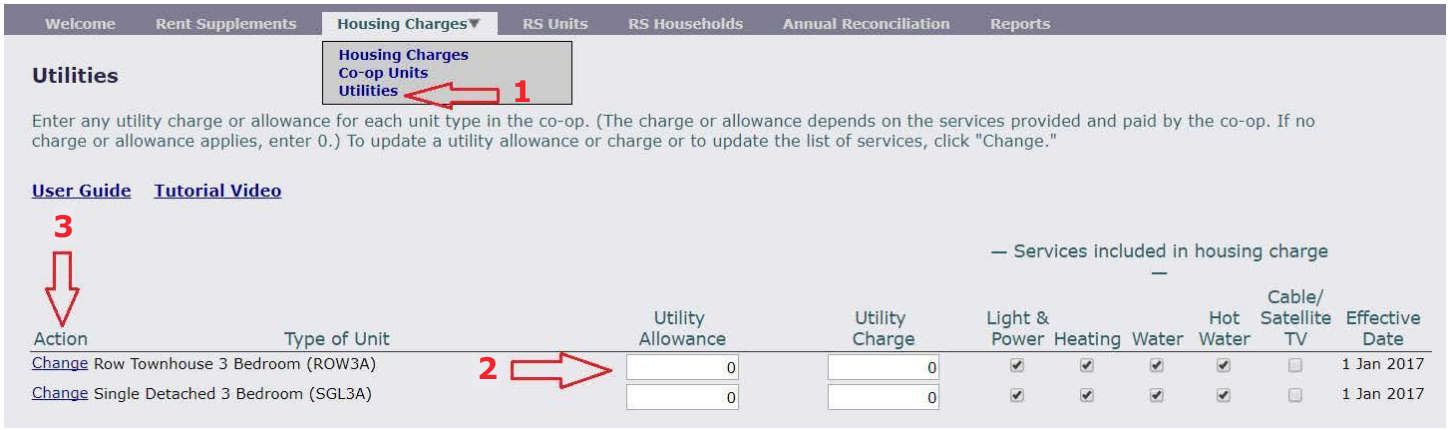


Second and subsequent years:

1 Choose **Utilities** in the **Housing Charges** drop-down menu.

2 If there were **Utility Allowance**, **Utility Charge** and/or **Services included in housing charge** changes effective on the first day of the fiscal year, update the applicable items (*values are carried over from the previous year so check that the values match the charges that were in effect at the beginning of the fiscal year*).

3 If there was a mid-year change, click **Change** under the first column on the left called **Action**.

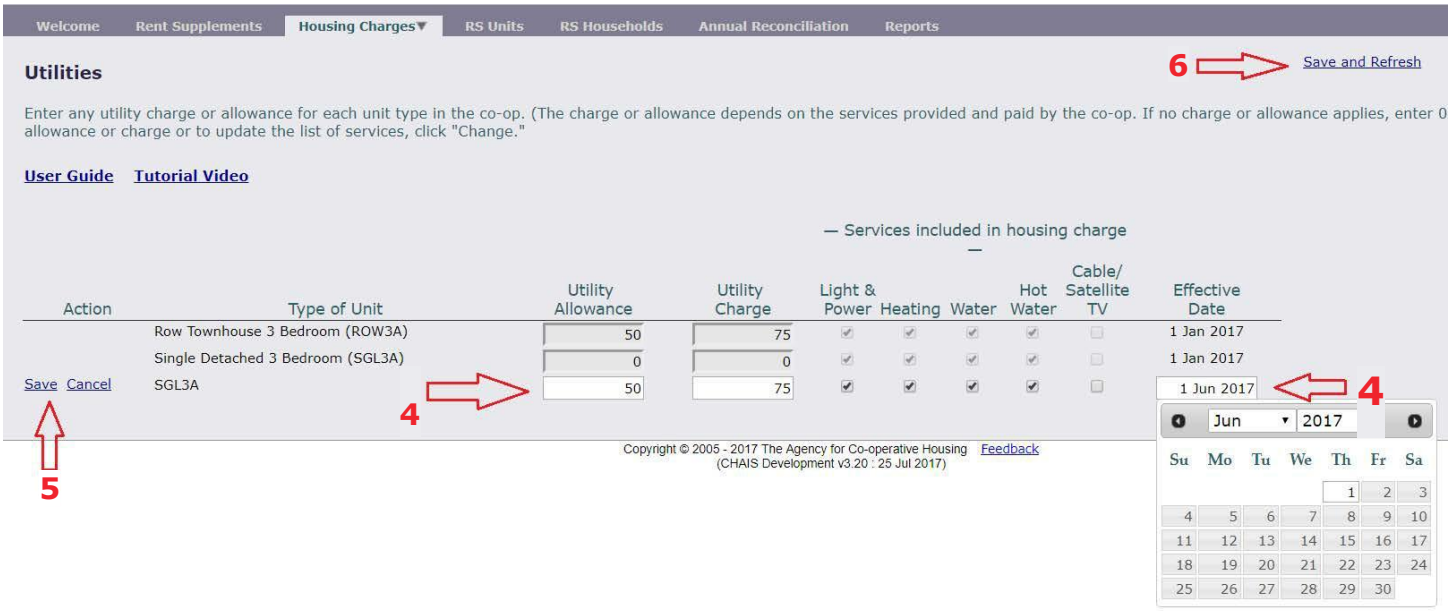


4 Update the **Utility Allowance**, **Utility Charge** and/or **Services included in housing charge** for each unit-type and enter the **Effective Date** in the pop-up calendar.

5 Click **Save** (or Cancel if you make a mistake).

6 Click **Save and Refresh** when all the amounts are entered (top right corner).

Note: If you make a mistake in the information you entered, please contact the Agency's Rent Supplement Coordinator.



STEP 4: Entering Co-op Units

First year only:

Enter every unit in your co-op, even units with no rent supplement. Follow the order used in your books. The same order will be used in the on-line system as well as in the reports generated from the system (to change the order of units, see ‘Changing the order of the list on page 9).

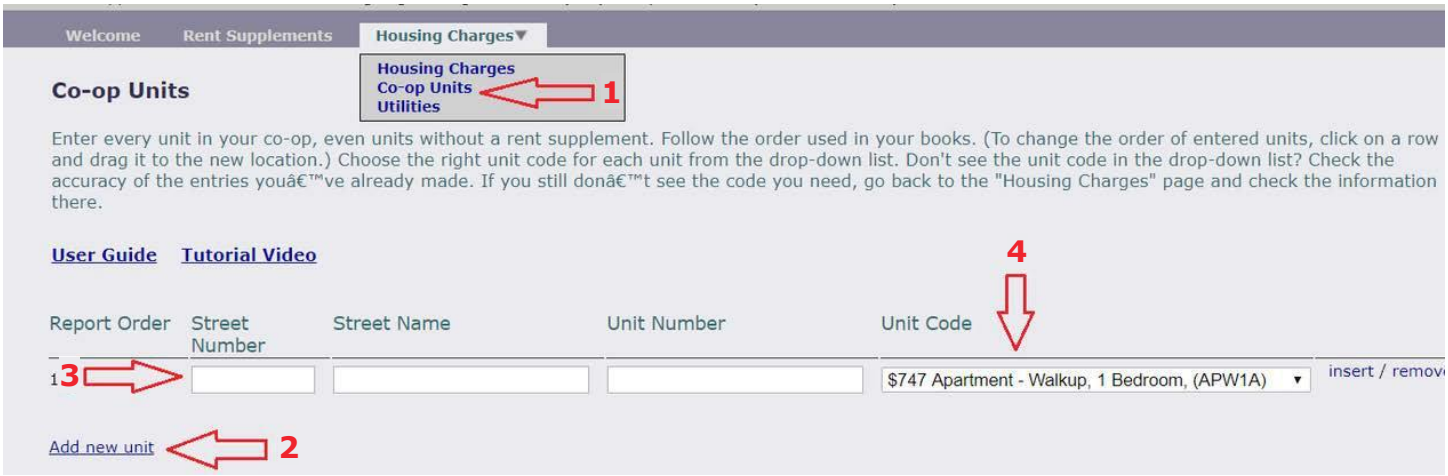
1 Choose **Co-op Units** in the **Housing Charges** drop-down menu.

2 Click on **Add new unit** on the bottom left of the screen.

3 Enter **Street Number**, **Street Address** and **Unit Number**.

4 Choose the right **Unit Code** for the unit from the drop-down list.

- The **Unit Code** drop down menu is based on unit types and housing charge information previously entered in the **Housing Charges Summary** tab.
- Missing a unit code? Check the accuracy of the entries you’ve made already. If you still don’t see the code you need, go back to the **Housing Charges (Summary)** page and check the information there.

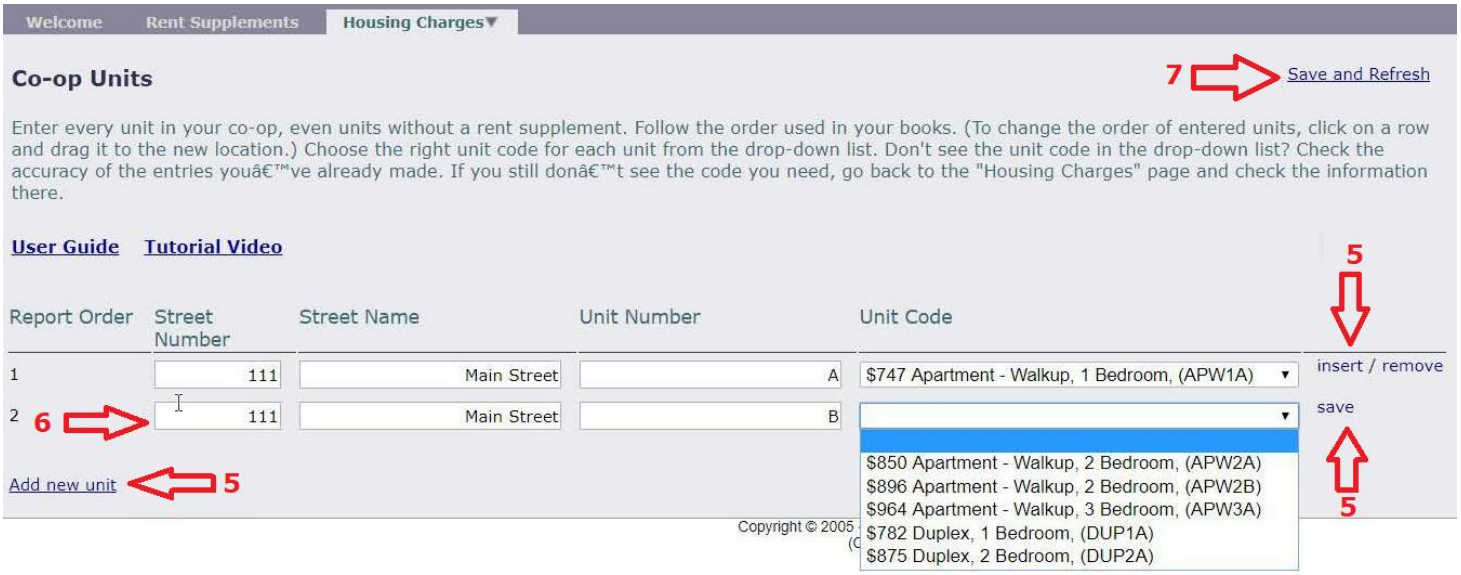


5 Click **save** or **Add new unit**. If you make a mistake click **remove**. To insert a row, click **insert** on the row above.

- When a row is added, the new line is pre-populated with the **Street Number** and **Street Name** from the previous row.
- Click on **Street Number** and **Street Name** to make changes.

6 Repeat steps 2-5 for all units.

7 Click on **Save and Refresh** when you are finished entering all the unit information (top right corner).



Second and subsequent years:

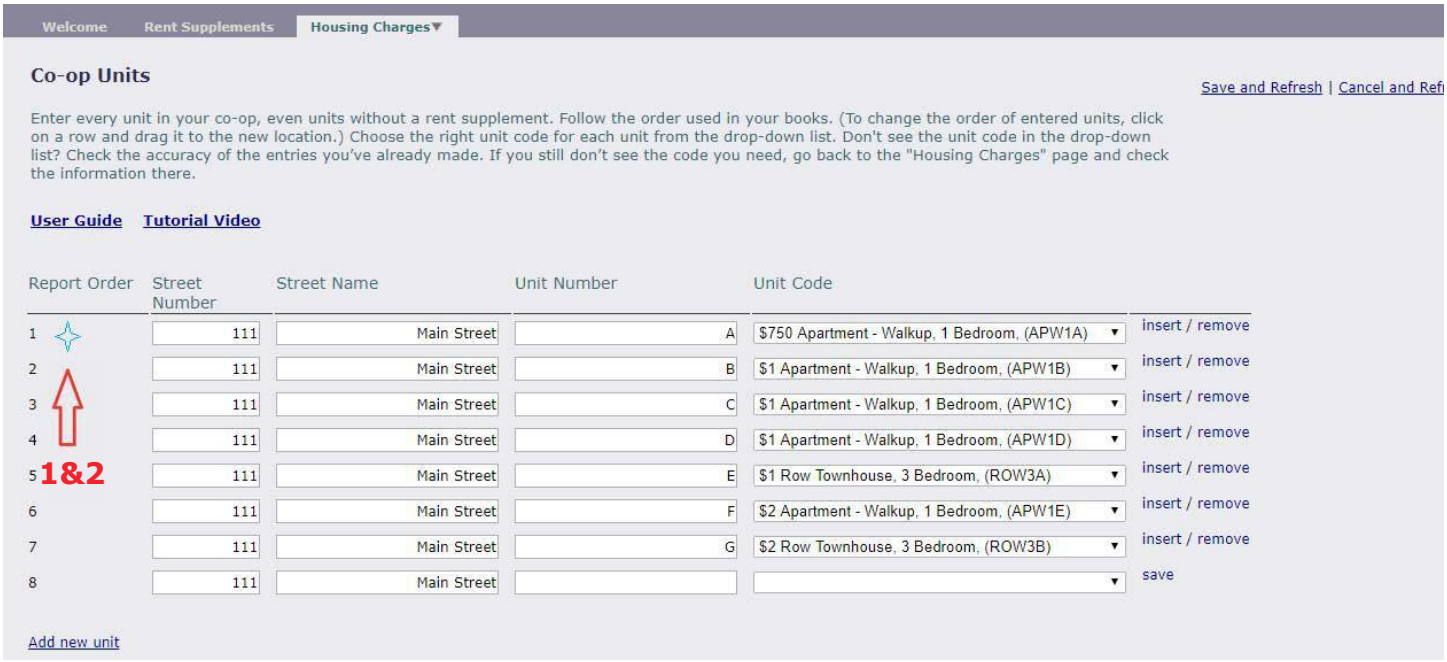
Once you enter the initial information into the system (above) you'll only need to adjust this page if there are errors, your co-op gains or loses units, or you want to change the unit order.

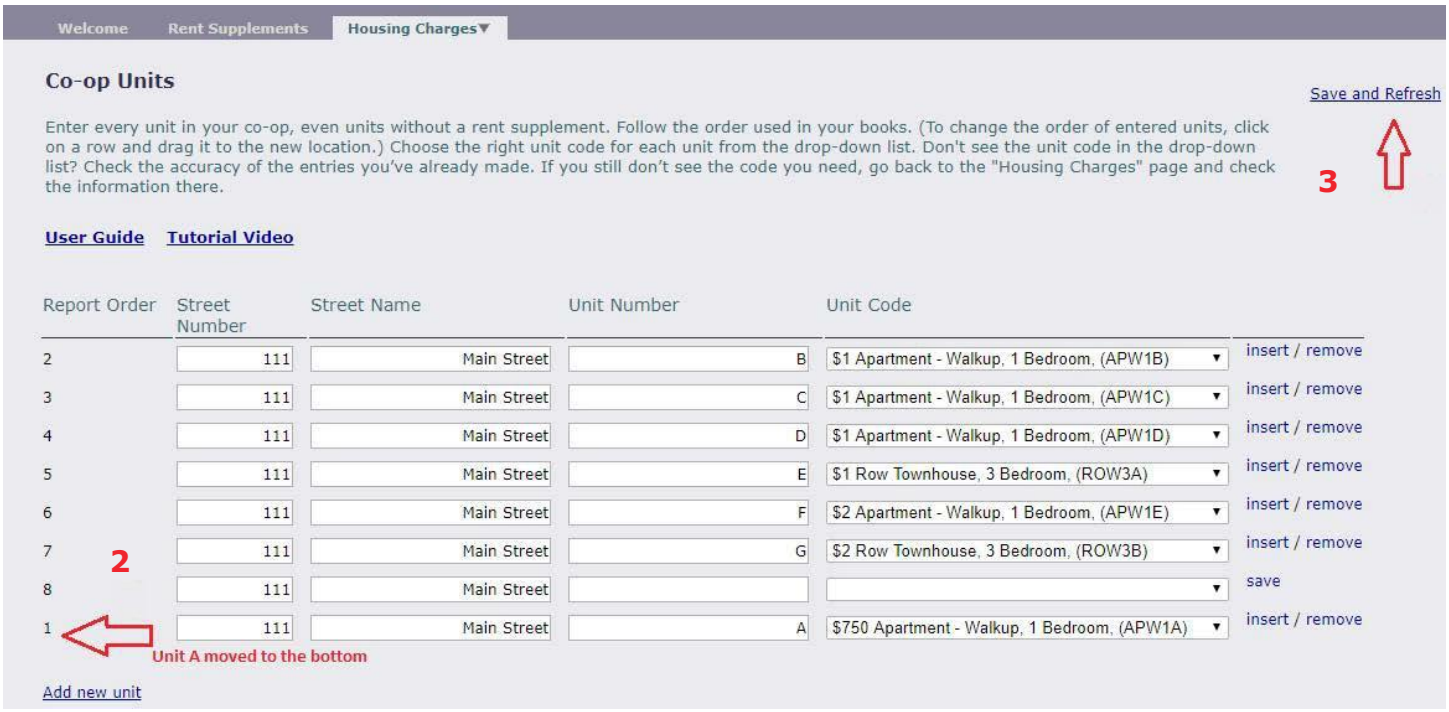
Changing the order of the list

1 To change the order of the list, hover the cursor near the **Report Order** number you want to move.

2 Click and hold the left mouse button while you drag the line to another row.

3 Click on **Save and Refresh** (top right corner).





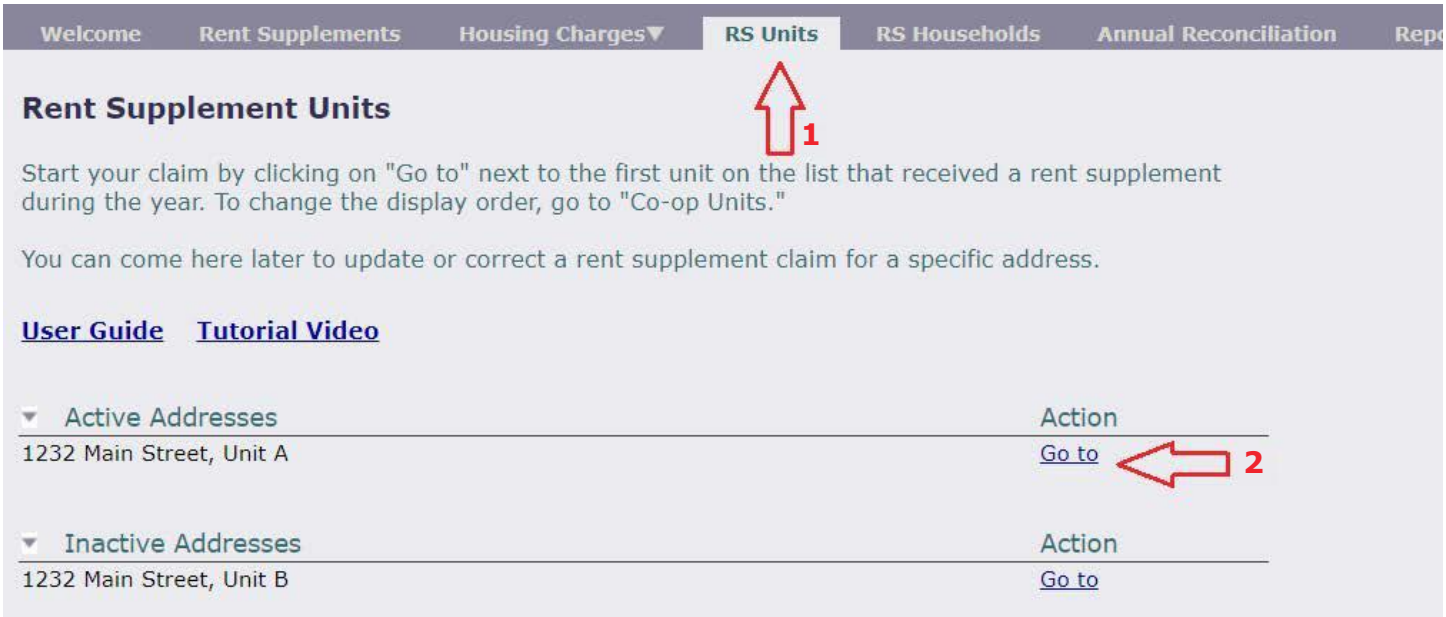
STEP 5: Entering Initial Household Information

After entering unit information in the Co-op Unit List you are ready to enter information on households receiving rent supplement assistance.

1 Select **RS Units**.

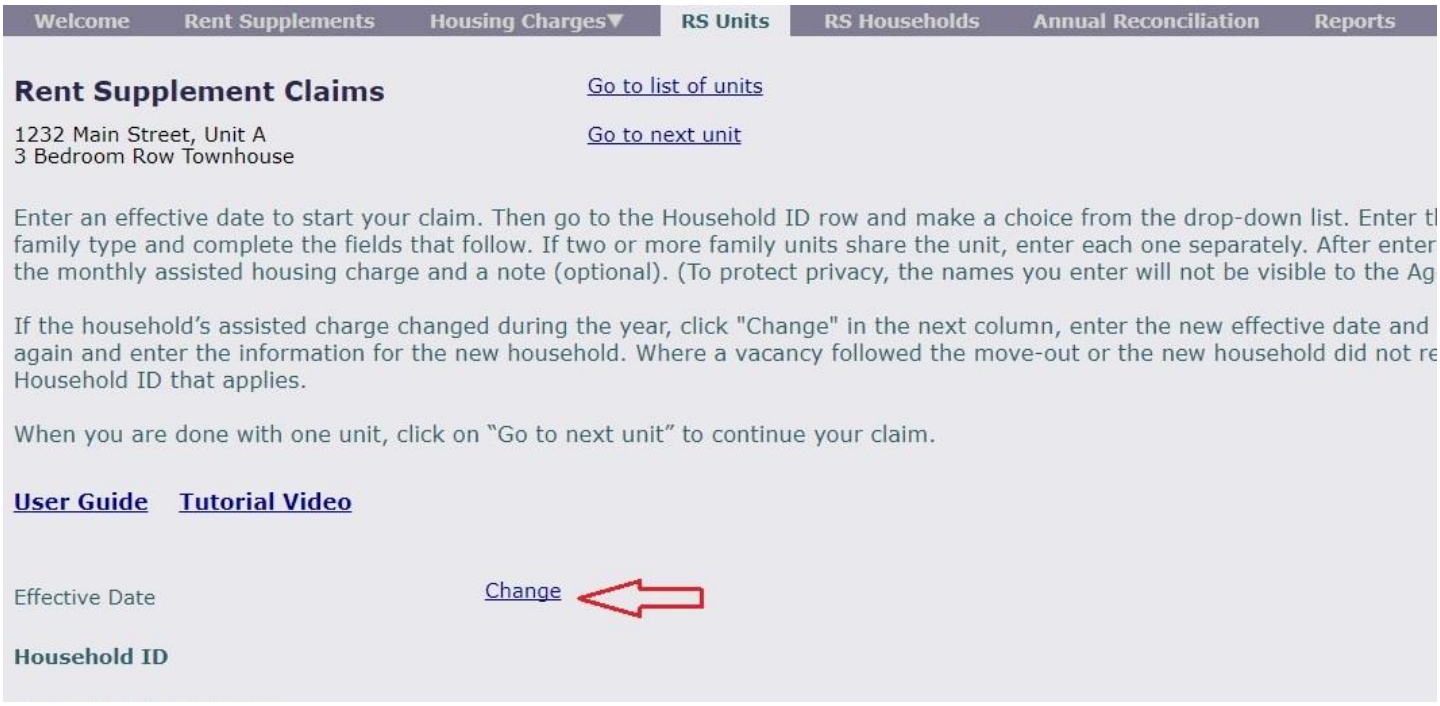
2 Click **Go to** next to the address for which you want to enter information.

3 This takes you to the **Rent Supplement Claims** page.



Effective Date

Select **Change** to enter the **Effective Date**. Then click on **Effective Date** to enter the date.



Household Information

1 On the **Household ID** dropdown list select **Create New**.

2 Enter the **Household name**

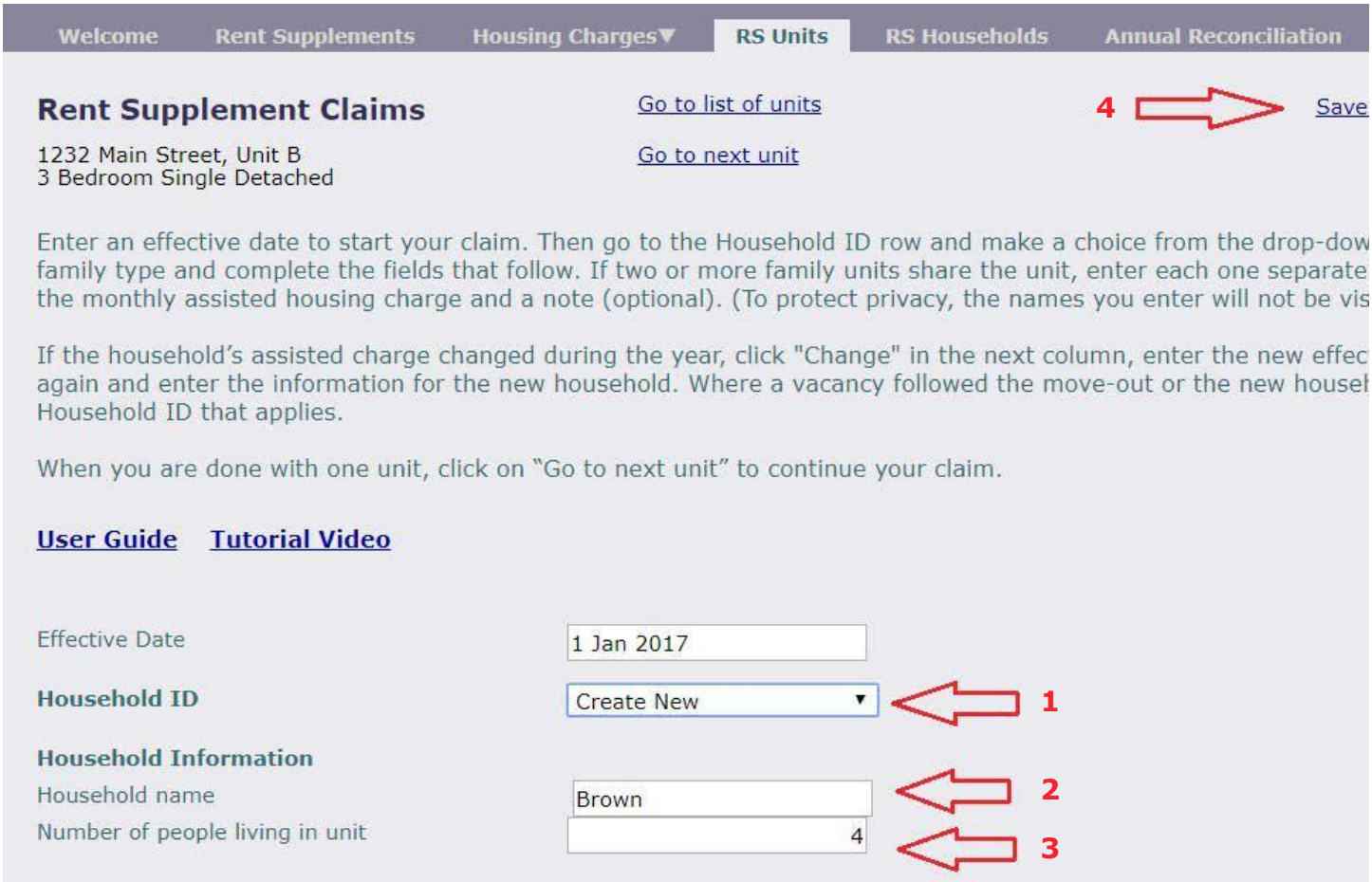
- This can be any name that is convenient for the co-op. It is highlighted blue because it is confidential information that only you and your auditor can see. The Agency and CMHC cannot see household names.

3 Enter the **Number of people living in the unit**. This includes all adults and children.

4 Click on **Save and refresh** (top right corner).

5 Enter the **Date of last income verification**.

Note: The system will generate a unique and unchanging **Household ID**. You can change the Household Name but this means that all past and future records will be changed to the new name.



Income Information

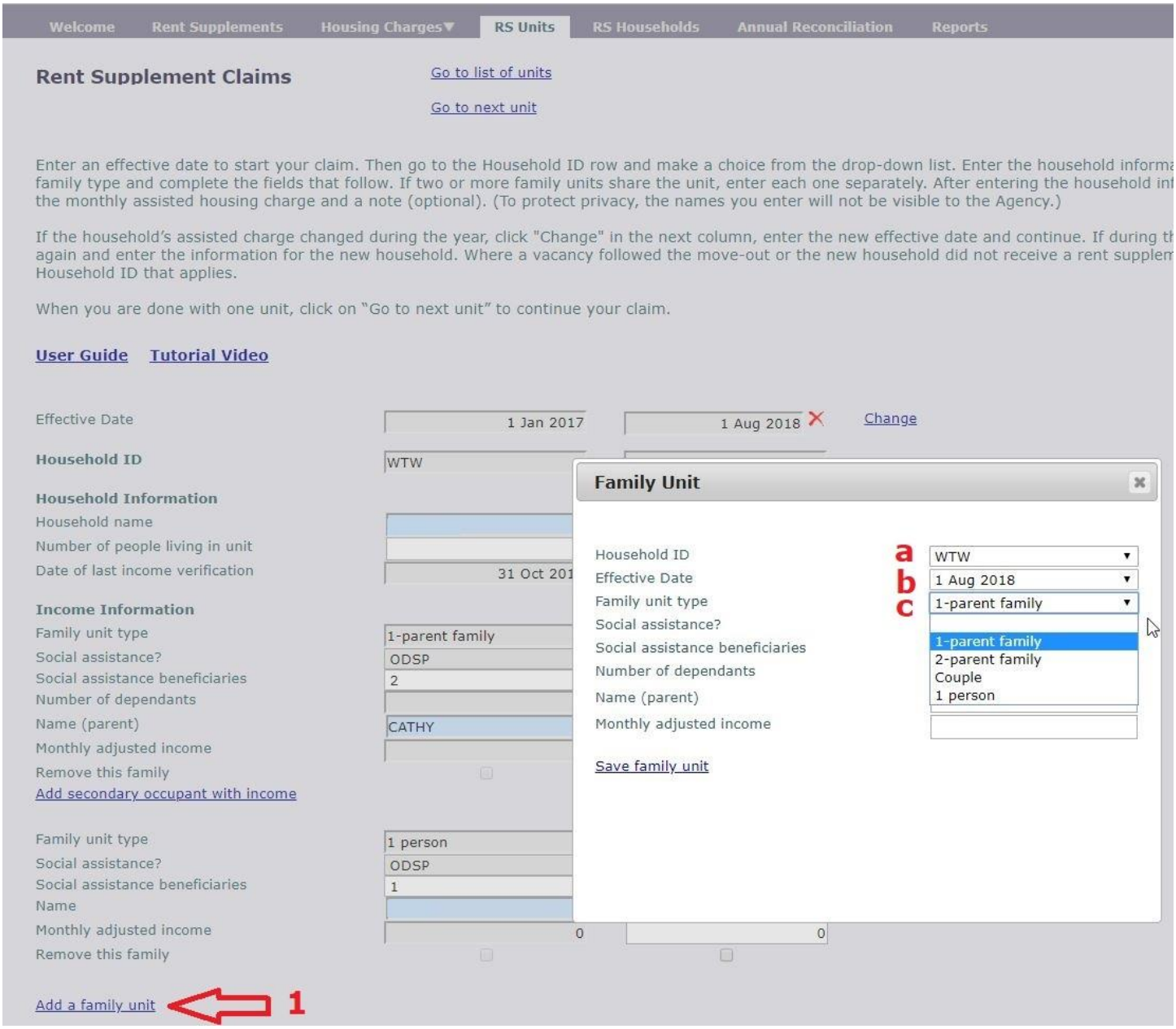
1 Click **Add a family unit** (if two or more families live in the household, enter each family unit separately):

a Click **Household ID** and select the one available option.

b **Effective Date** displays and no action is needed.

c Select the **Family unit type** from the drop-down menu.

> **Family unit:** A person or couple and dependants living in a unit.

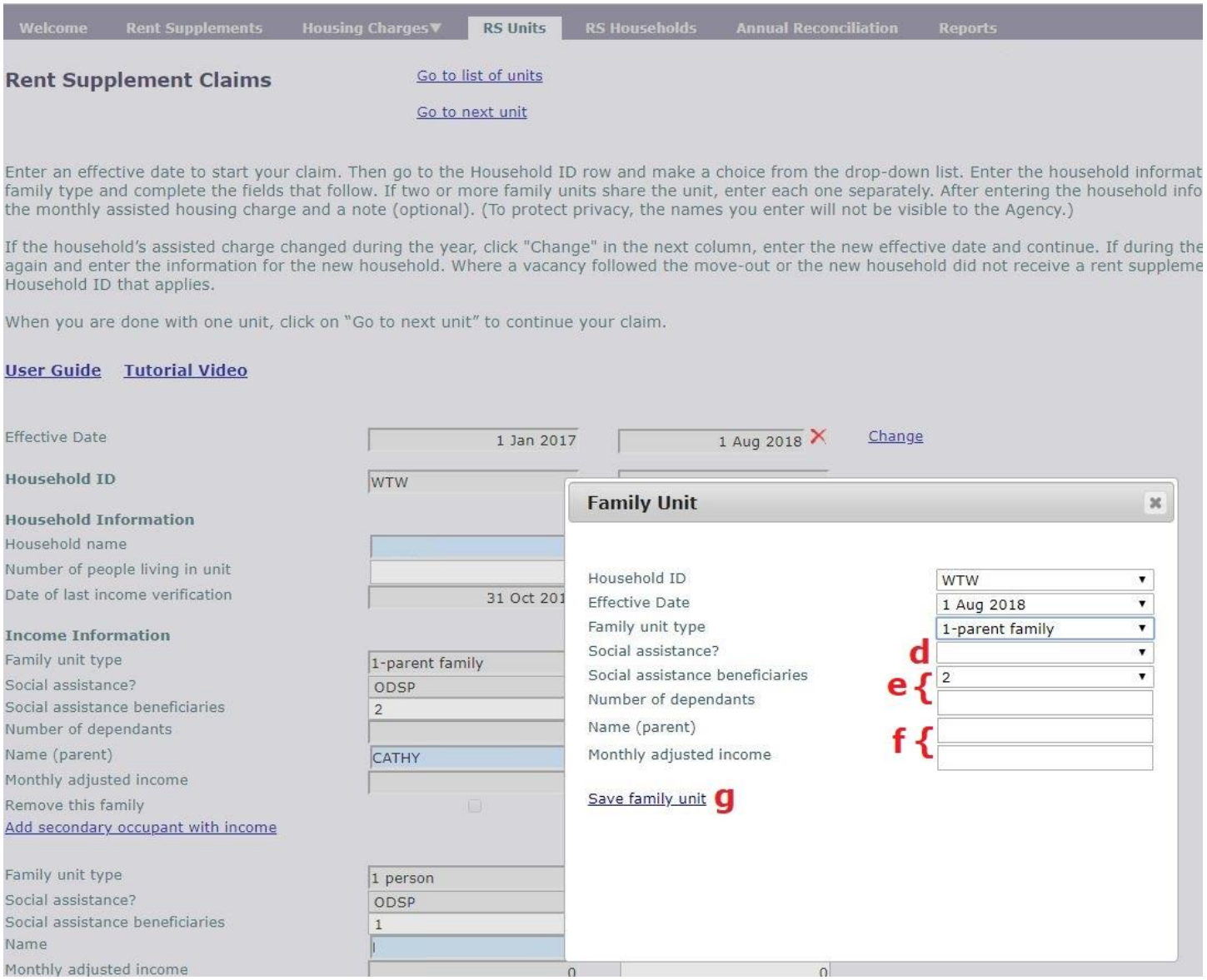


d Click on **Social Assistance?** and choose the option that applies from the drop-down menu.

e If applicable, enter the **Number of beneficiaries** and **Number of dependants.**

f Enter the **Name(s)** and **Monthly adjusted income**.

g Click **Save family unit**.



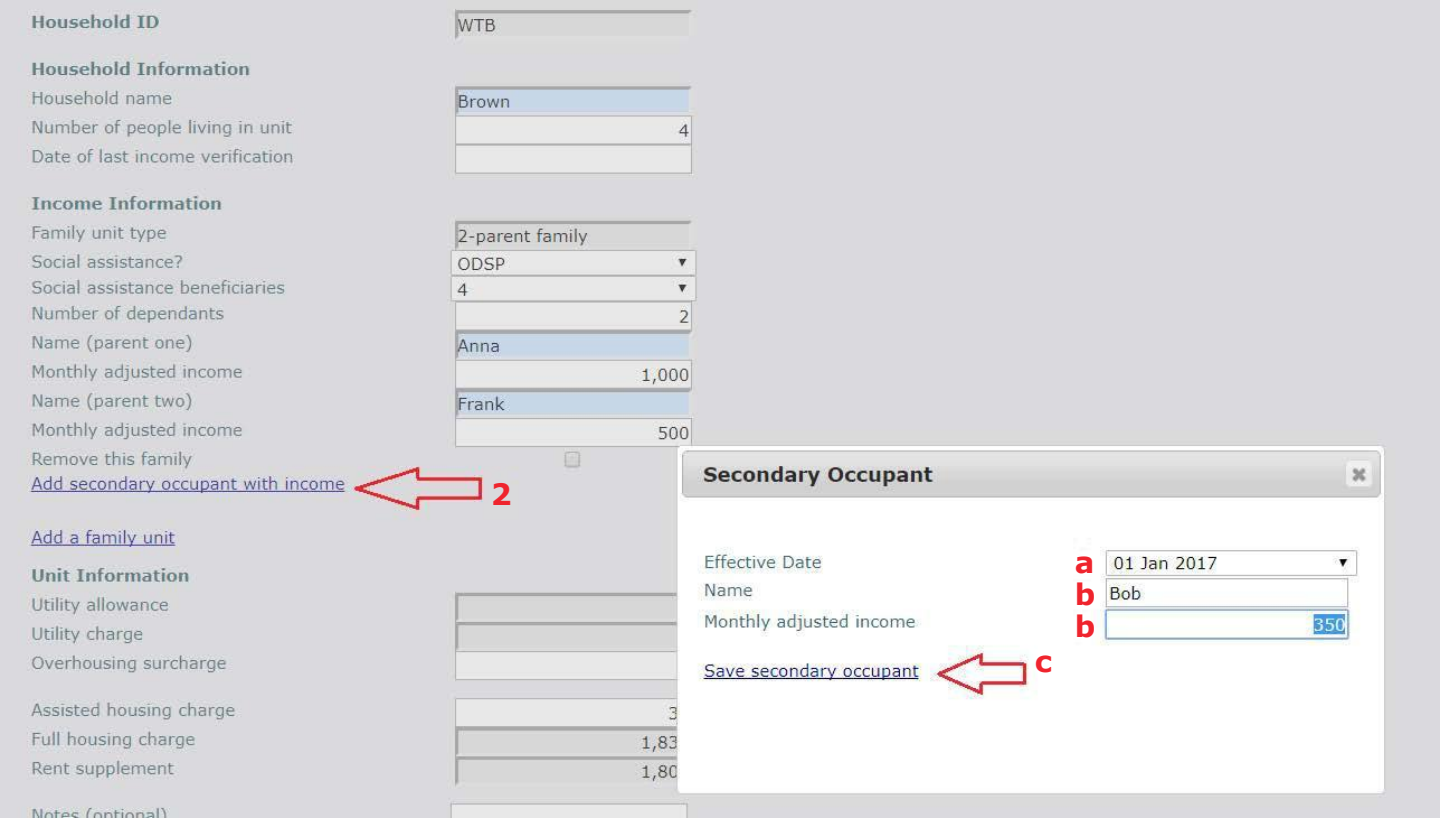
2 If applicable to one or more dependants select **Add secondary occupant with income** (secondary occupant is not applicable in PEI)

3 **a** Select the **Effective Date** from the drop-down menu.

b Enter the **Name** and **Monthly adjusted income**.

c Click **Save secondary occupant**.

4 If two or more family units share the unit, repeat the previous two steps for each family unit.



Unit Information

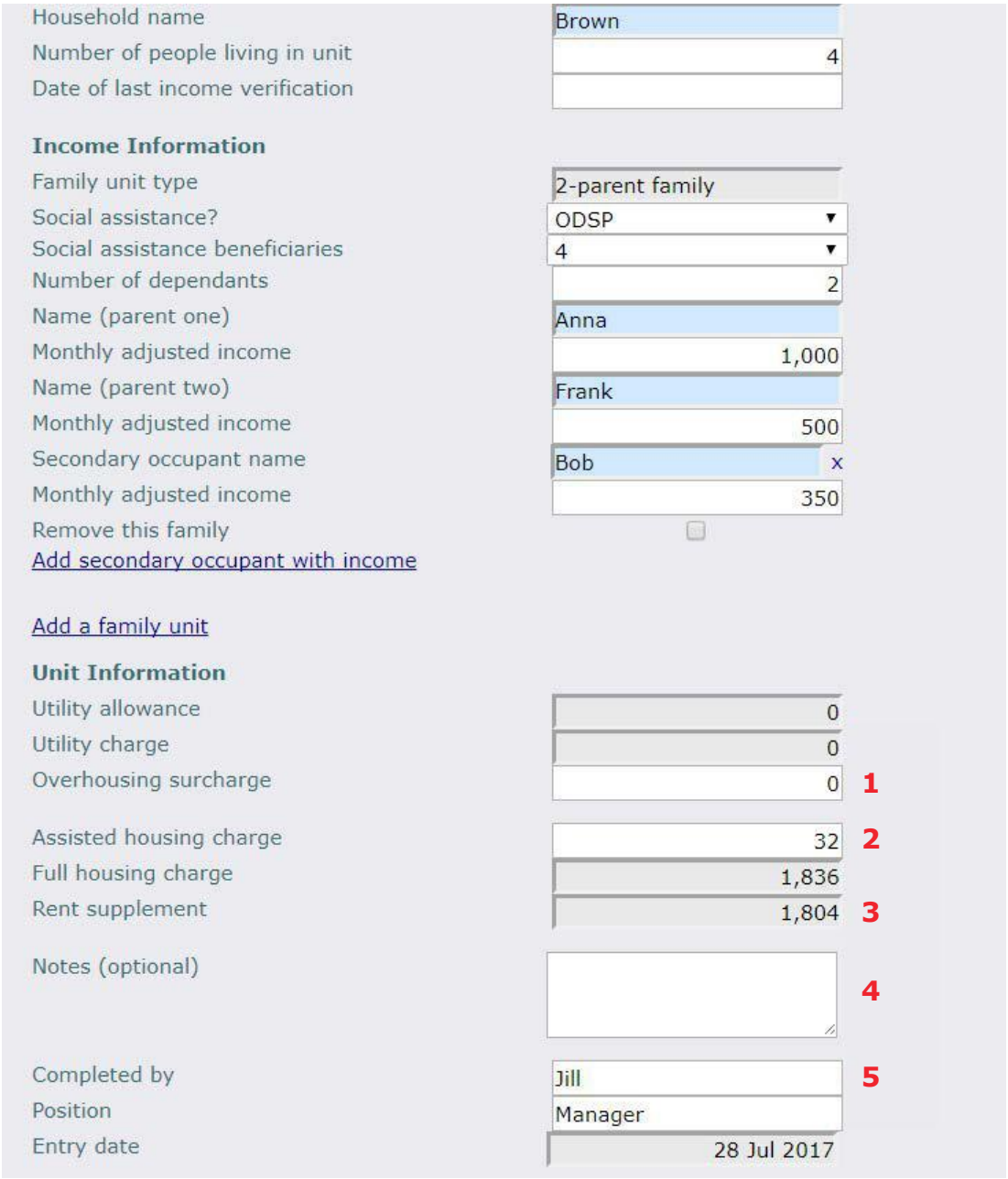
1 Enter an **Overhousing surcharge** if applicable.

2 Enter the monthly **Assisted housing charge**.

3 Confirm that the automatically calculated **Rent Supplement** amount matches the co-op's records.

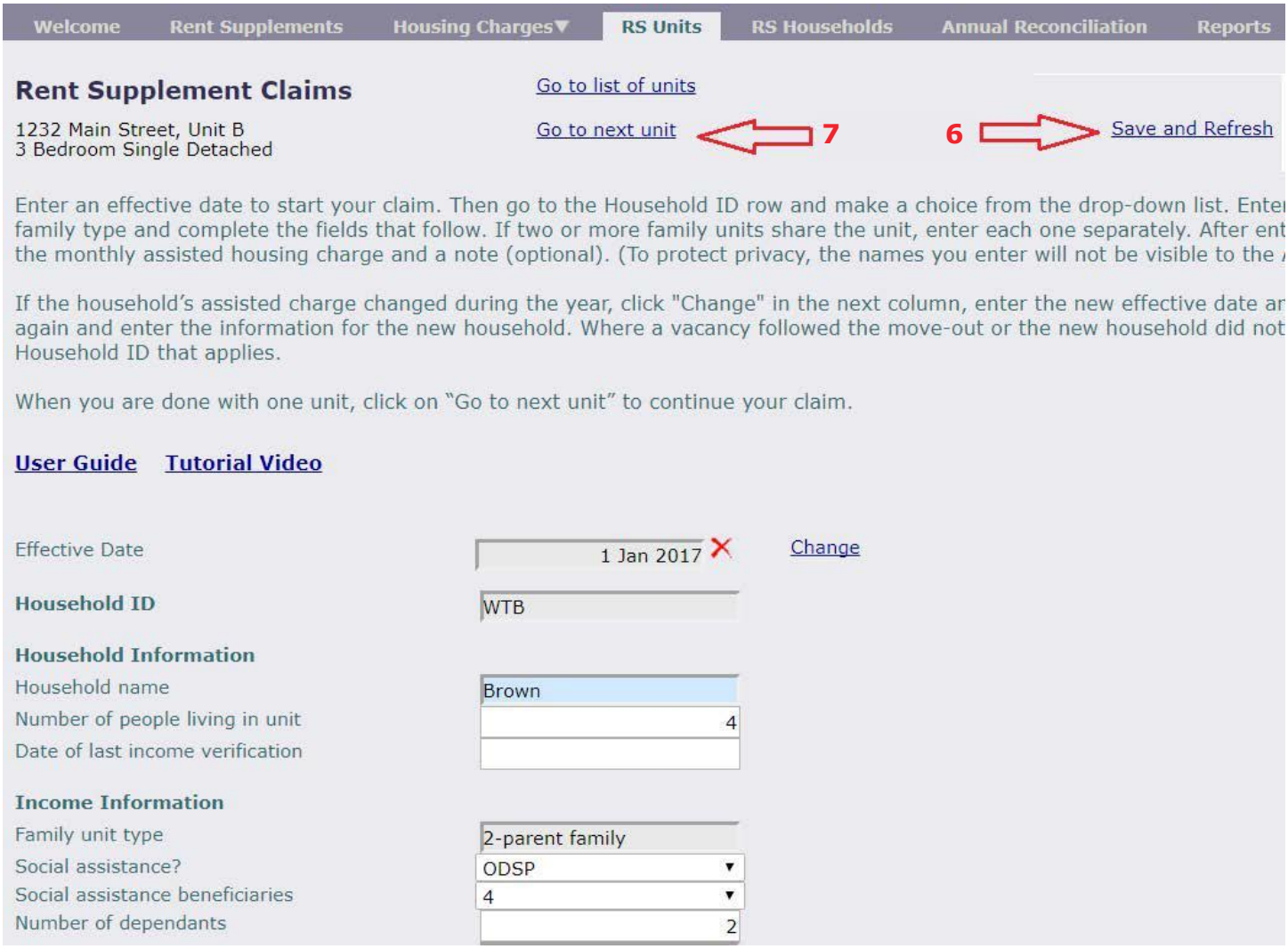
4 You can add optional **Note**s. (*To make the **notes** area bigger, click on the bottom right corner while holding the left mouse button*)

5 Enter **Completed by** and **Position**. You only need to do this once for each session.



6 Go to the top of the screen and click **Save and Refresh**.

7 Select **Go to next unit** to continue in order or **Go to list of units**.



STEP 6: Entering Changes

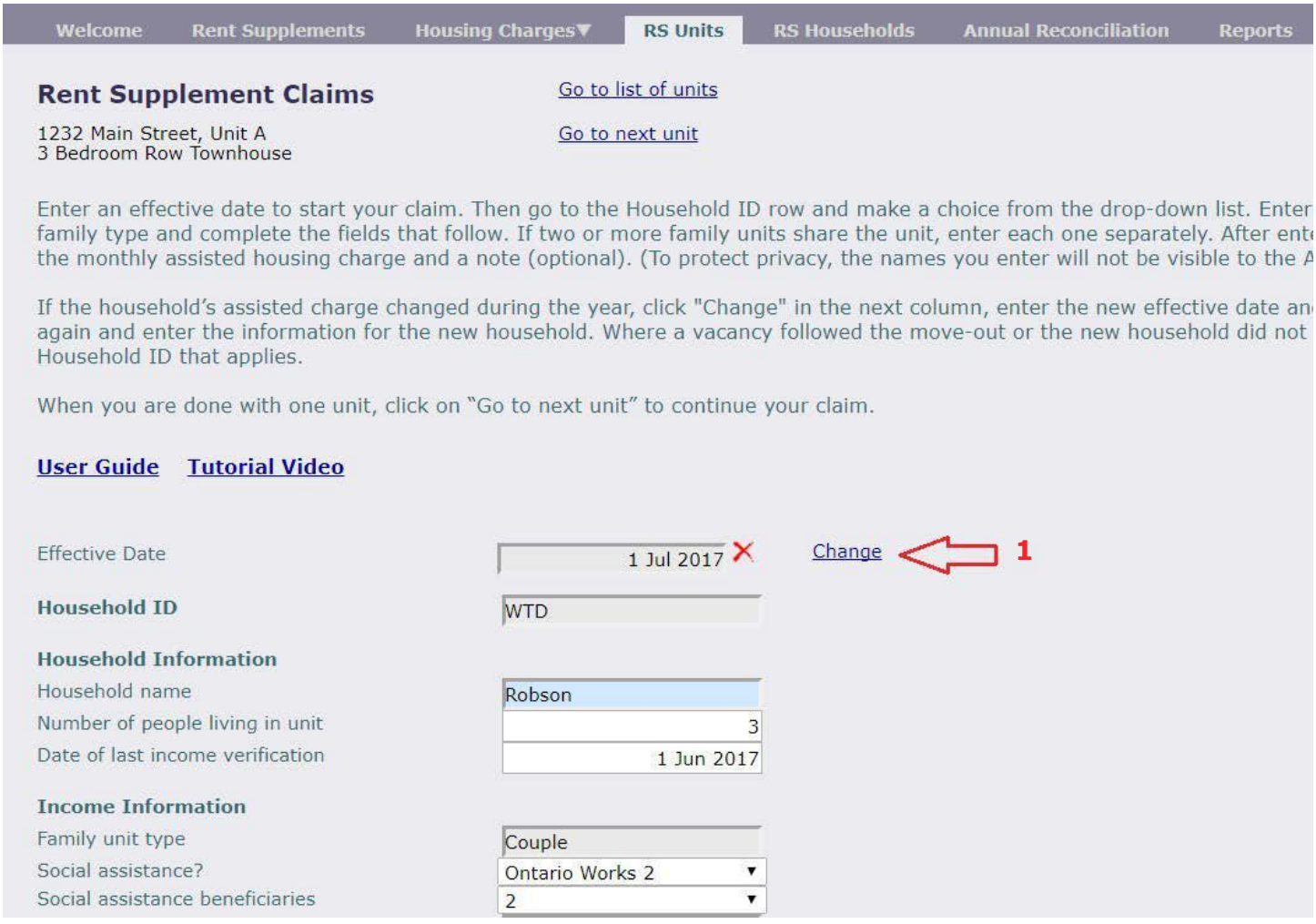
The following scenarios all start at the applicable **Rent Supplement Claims** page. (See Step 5: Entering Initial Household Information, steps 1-4 if needed.)

Notes:

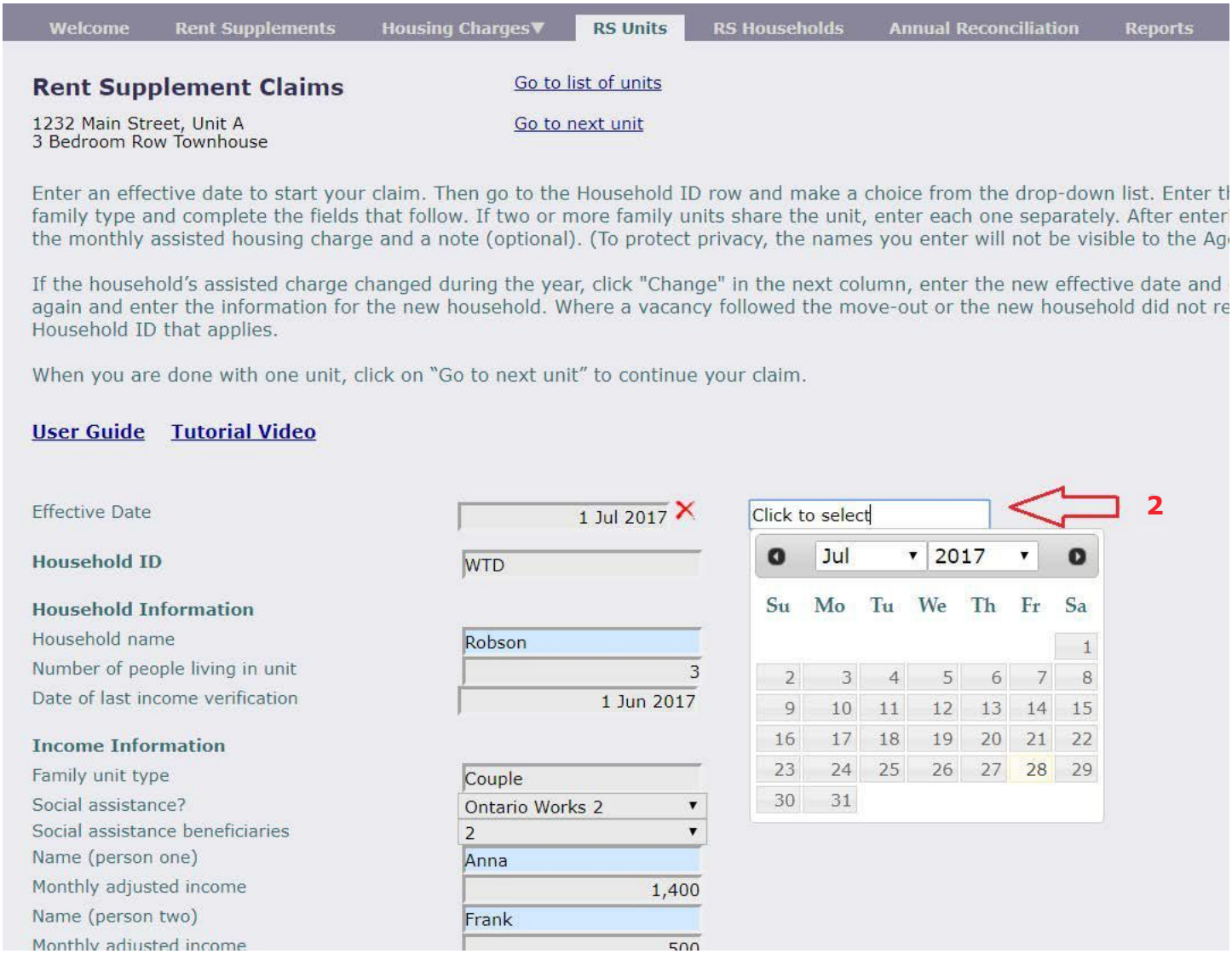
1. Only enter changes that result in a change to the **Assisted housing charge**.
2. The Effective Date to enter when a household moves out depends on whether another assisted household immediately moves in.
3. For mid-month changes, all values must be entered as if they were for the entire month. The effective date will determine the partial month calculation.

Scenario 1: The household composition changes

1 Click **Change** (to the right of the Effective Date columns).

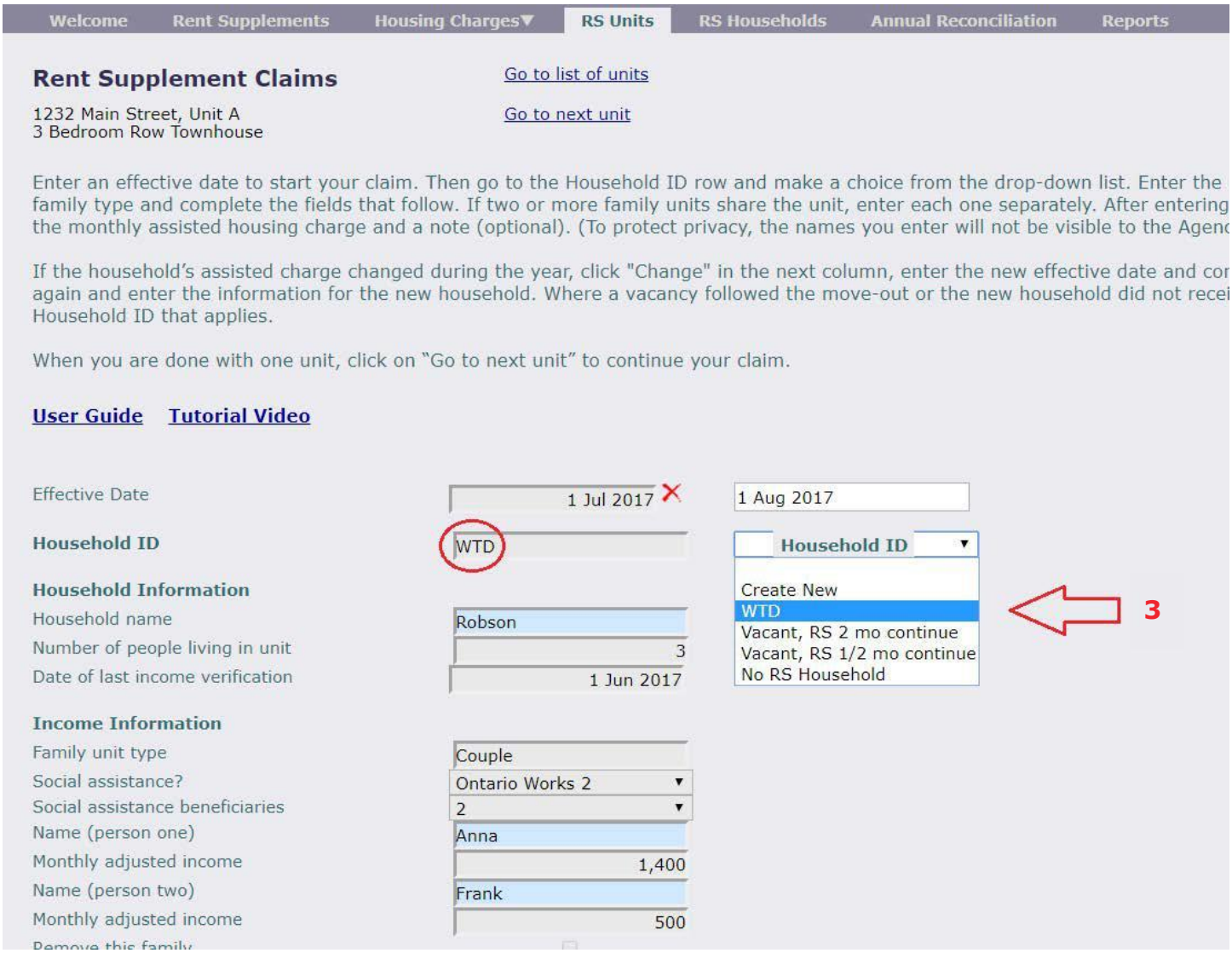


2 Select **Click to Select** to enter the **Effective Date**.



Note: A move-out happens on one day and the move-in date is always the following day.

3 Select **Household ID** (Select the same ID as the column to the left).



Note: There are a few options to select with **Household ID**

1. If the household moving in wasn't receiving rent supplement before, select "Create New."
2. If the household moving in was receiving rent supplement before, select Household ID from the drop-down list (provided that you have moved them out of their previous unit)
3. If the unit is remaining vacant for any period of time select one of the applicable "Vacant" options.
4. If the new household moving in isn't receiving rent supplement, select "No RS Household."

4 Click **Save and Refresh** (top right corner).

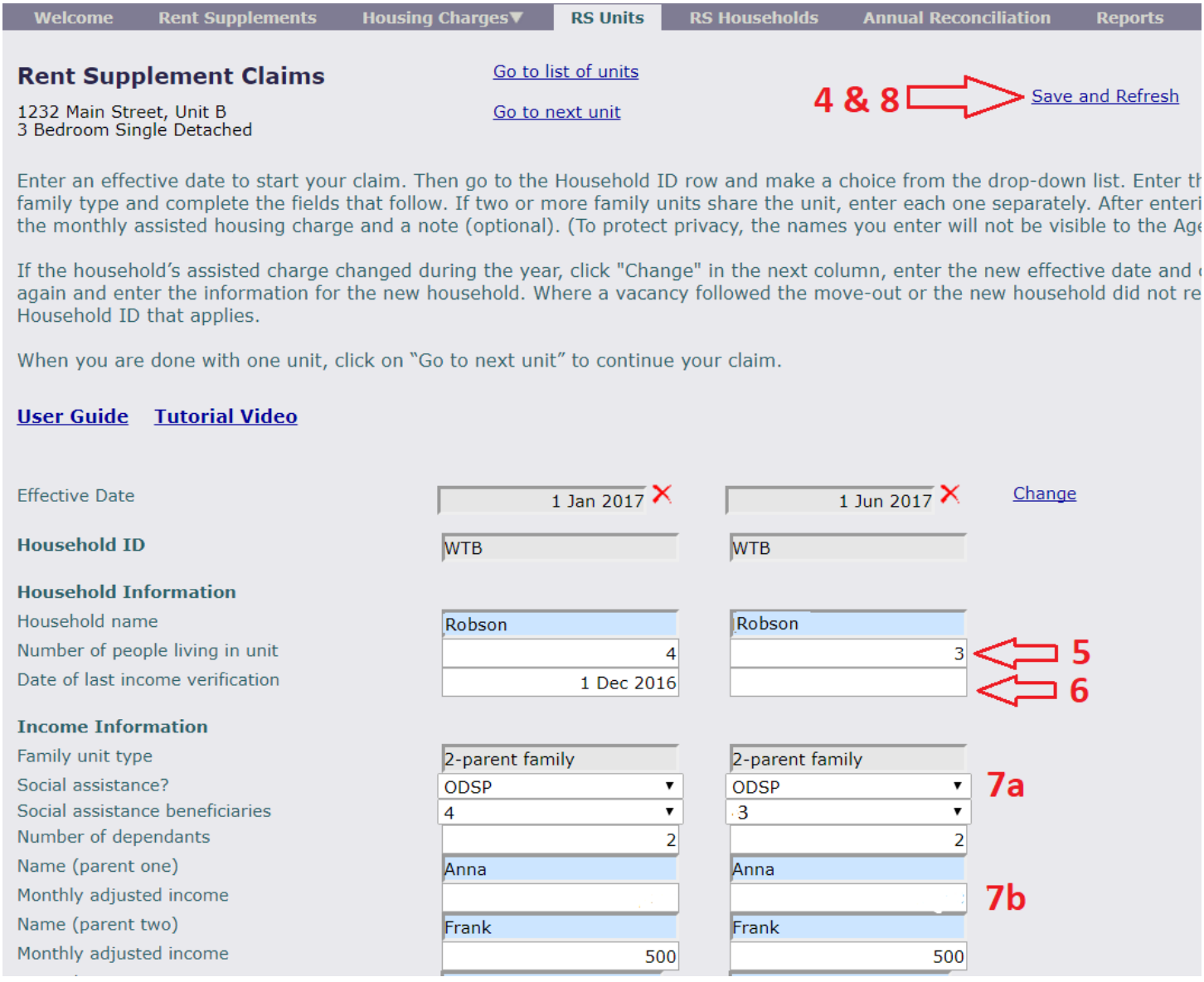
5 Update the **Number of people living in unit**.

6 Add the date of the last income verification.

7 Update the **Income Information** section, including:

- **a** Social assistance
- **b** Change(s) in income

8 Click **Save and Refresh**.

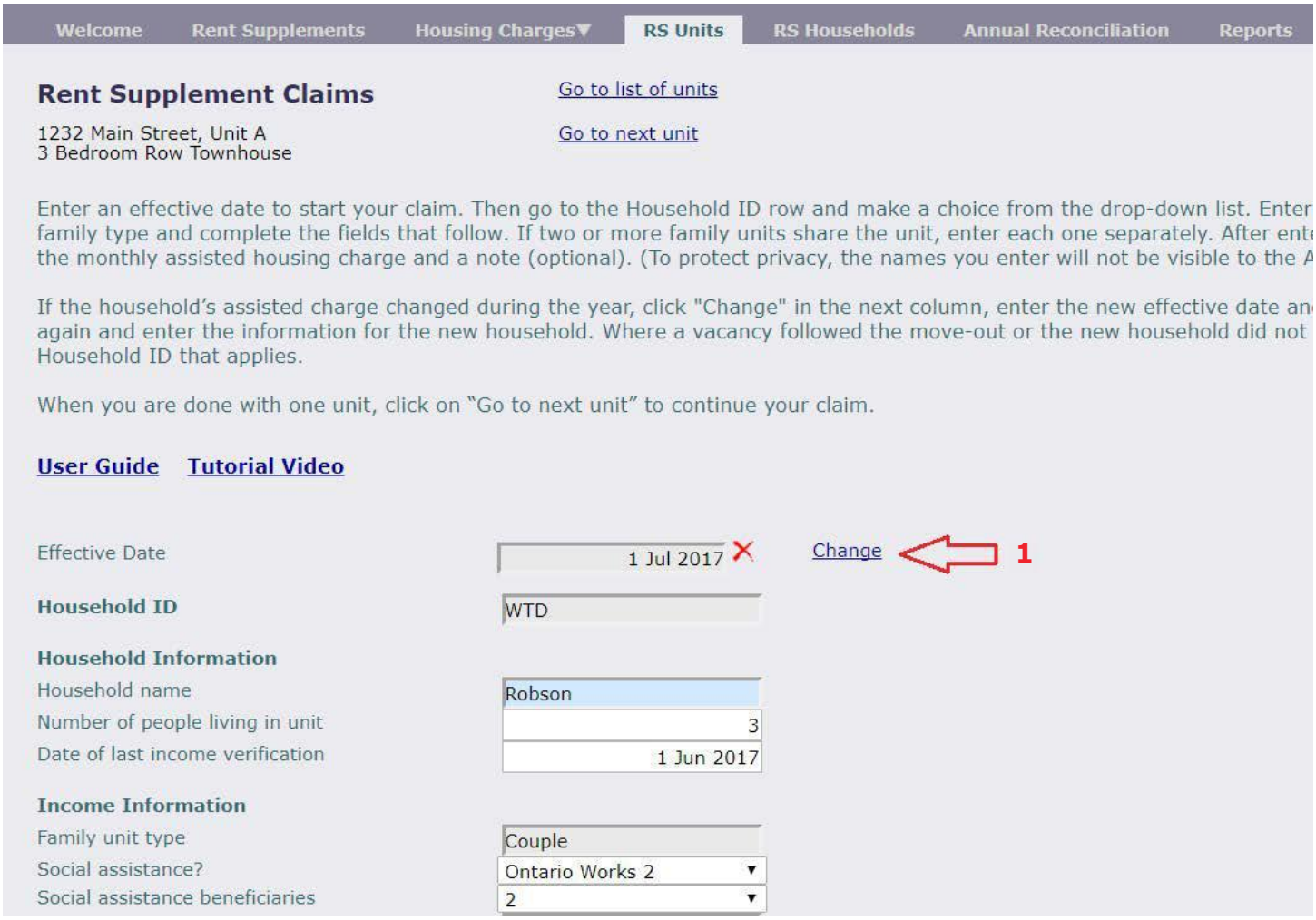


Note: Unless there is additional income outside of social assistance, the monthly adjusted income will be zero.

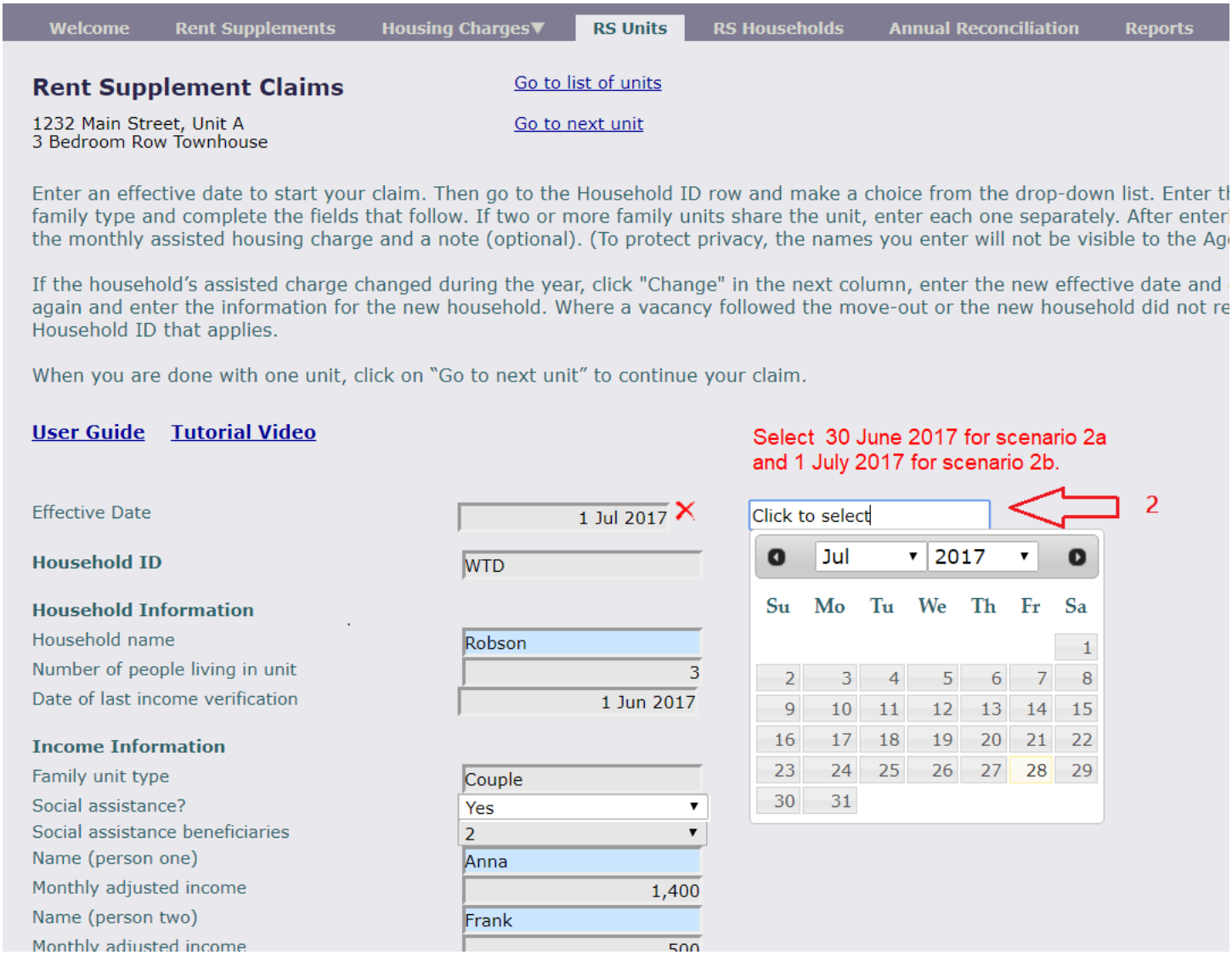
Scenario 2a: A household moves out with no immediate move-in

If another assisted household does not immediately move in:

1 Click **Change**. (*right of the Effective Date columns*)



2 Select **Click to Select** to enter the **Effective Date**.



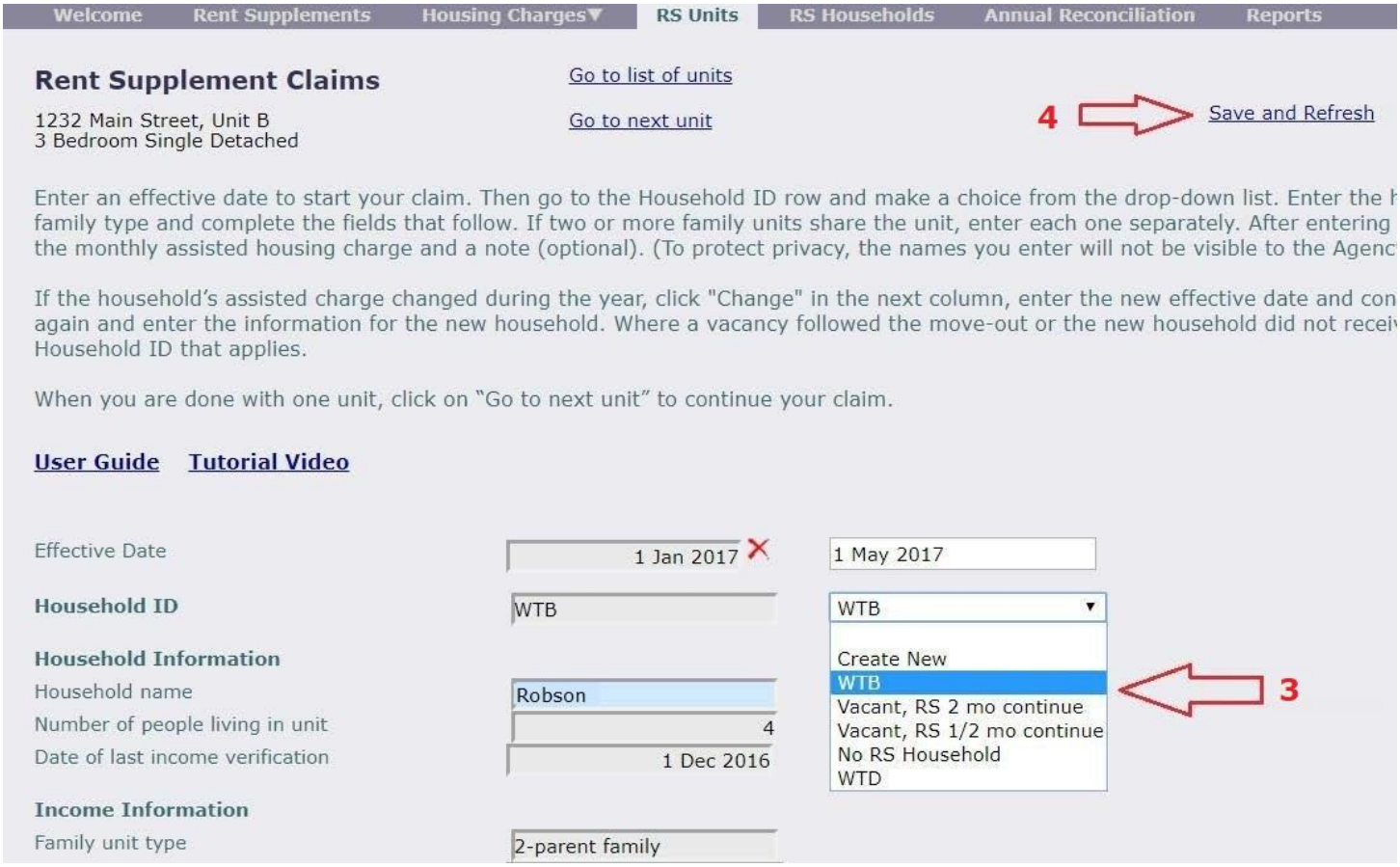
3 Select the applicable option from the **Household ID** drop down list:

i **Vacant, RS 2 mo continue**: If proper notice wasn't given and the unit qualifies for up to 2 months of vacancy loss.

ii **Vacant, RS ½ mo continue**: If proper notice was given and the unit qualifies for up to ½ month of vacancy loss.

iii **No RS household**: If a non-RS household moves in on the Effective Date or the unit does not qualify for either vacancy loss.

4 Click on **Save and Refresh.**



Scenario 2b: A household moves out with an immediate move-in

1 If another assisted household immediately moves in:

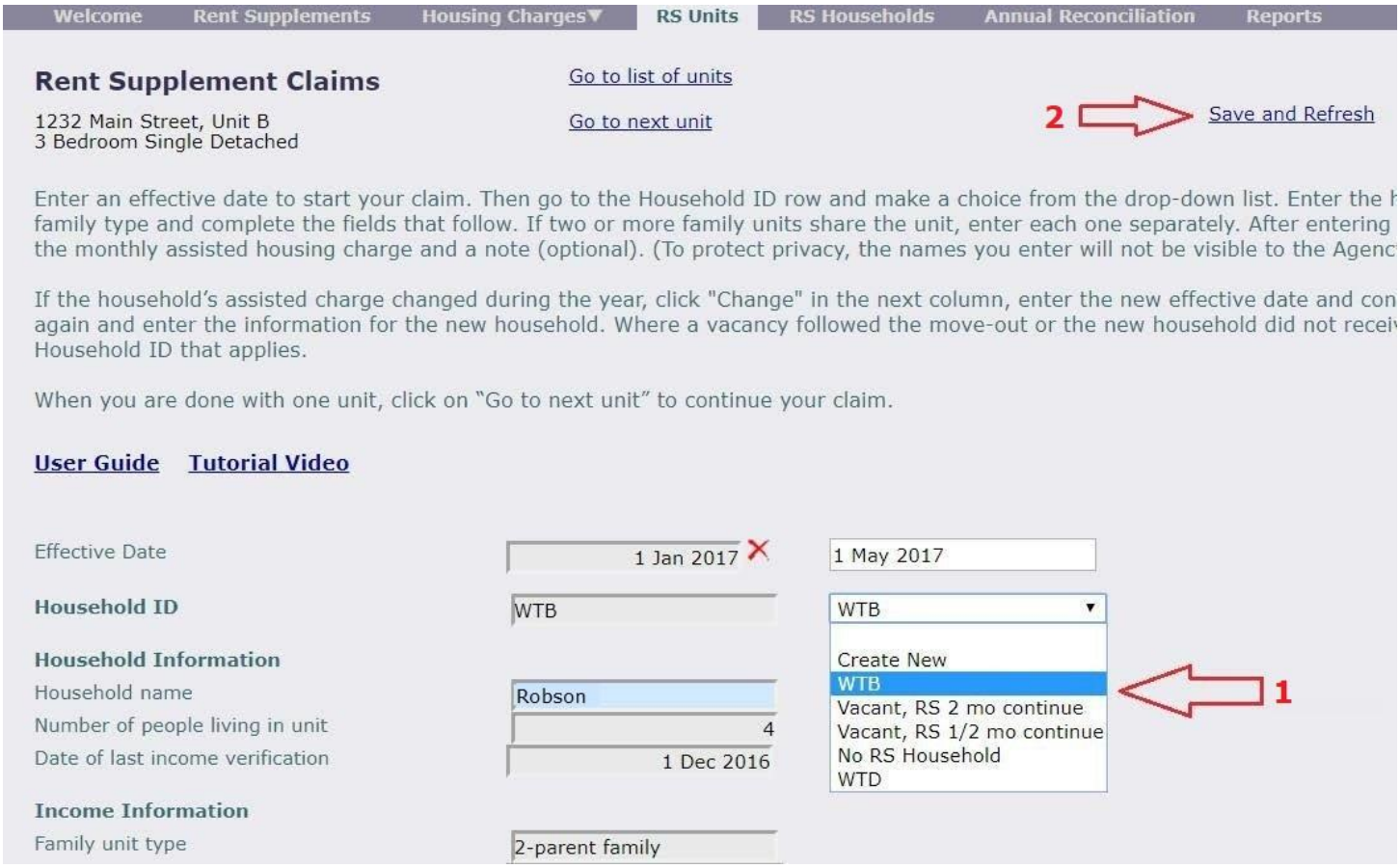
- **i** Select the **Household ID** of the incoming household if it is on the drop down list (*Note that a household that is changing units must be entered as moved out of the old unit before it becomes available on the drop down list to be moved into its new unit.*)
- **ii** Otherwise select **Create New** and go to **Step 5: Entering Initial Household Information – Household Information** and continue with: **7. Enter the Household name**

2 Click on **Save and Refresh**

Notes:

1 If another assisted household moves in immediately on the first of the month, the Effective Date to be entered is the last day of the previous month. However, if another assisted household does not immediately move in, the Effective Date is the first of the month.

2 If there is any kind of rent supplement continuance you will need to write a note in the notes section explaining the reason for the continuance.



Scenario 3: A new household moves into a unit

When you move a new household in make sure you move out the previous household first.

1 Enter the effective date (first day of the month)

2 Follow the steps in Step 5

3 On the **Household ID** dropdown list select one of the following:

a Create New if the household moving in has never received rent supplement before

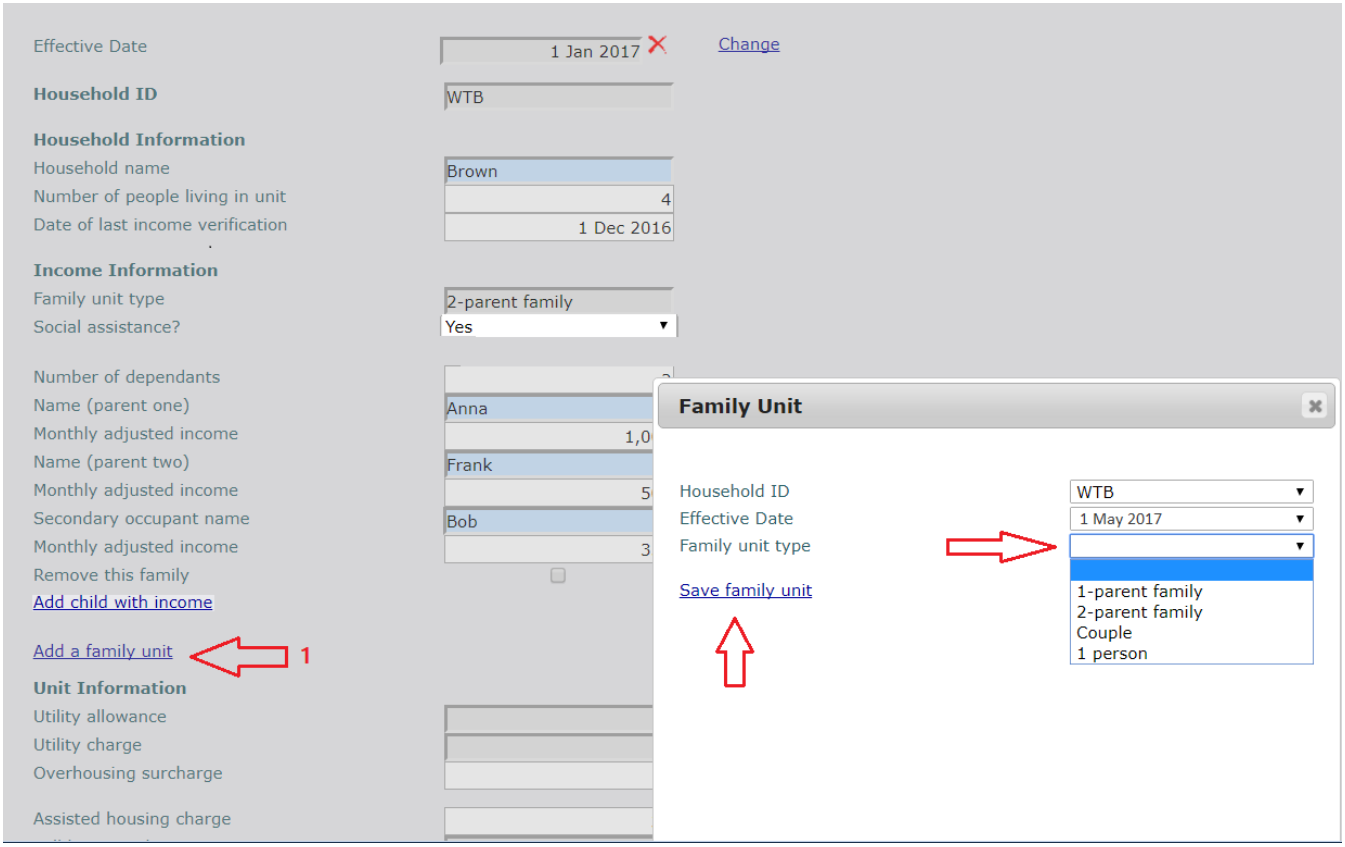
b If the household has received rent supplement before and you have moved them out of their previous unit their household ID will appear on the drop-down list.

c Select **No RS Household** if the household moving in is not going to be receiving rent supplement.

Scenario 4: A second family moves into a unit

If two or more families share a co-op unit, you need to enter each family separately.

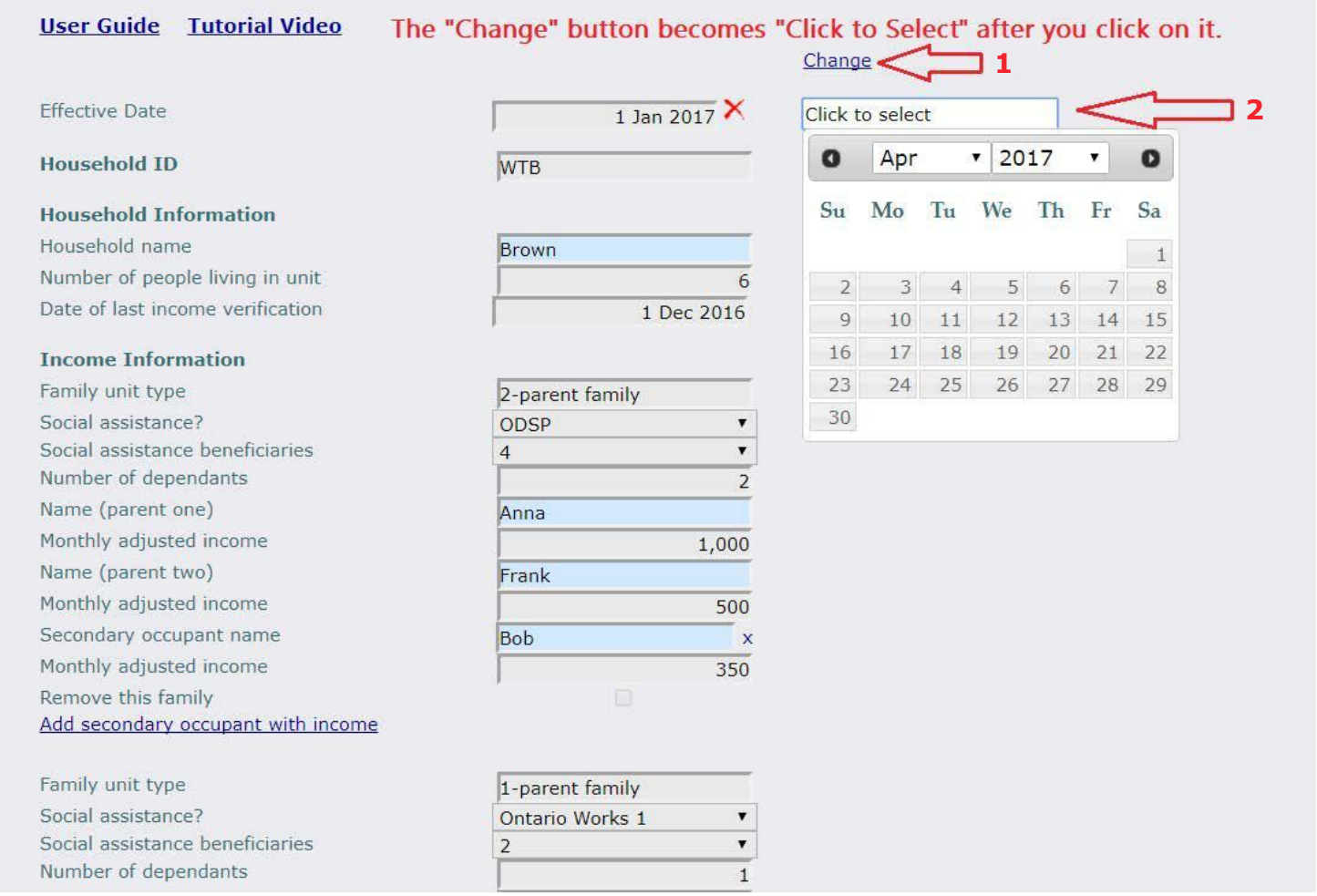
1 Go to **Step 5: Entering Initial Household Information – Income Information** and continue with **Add a Family Unit**.



Scenario 5: A family unit moves out of a unit with multiple families

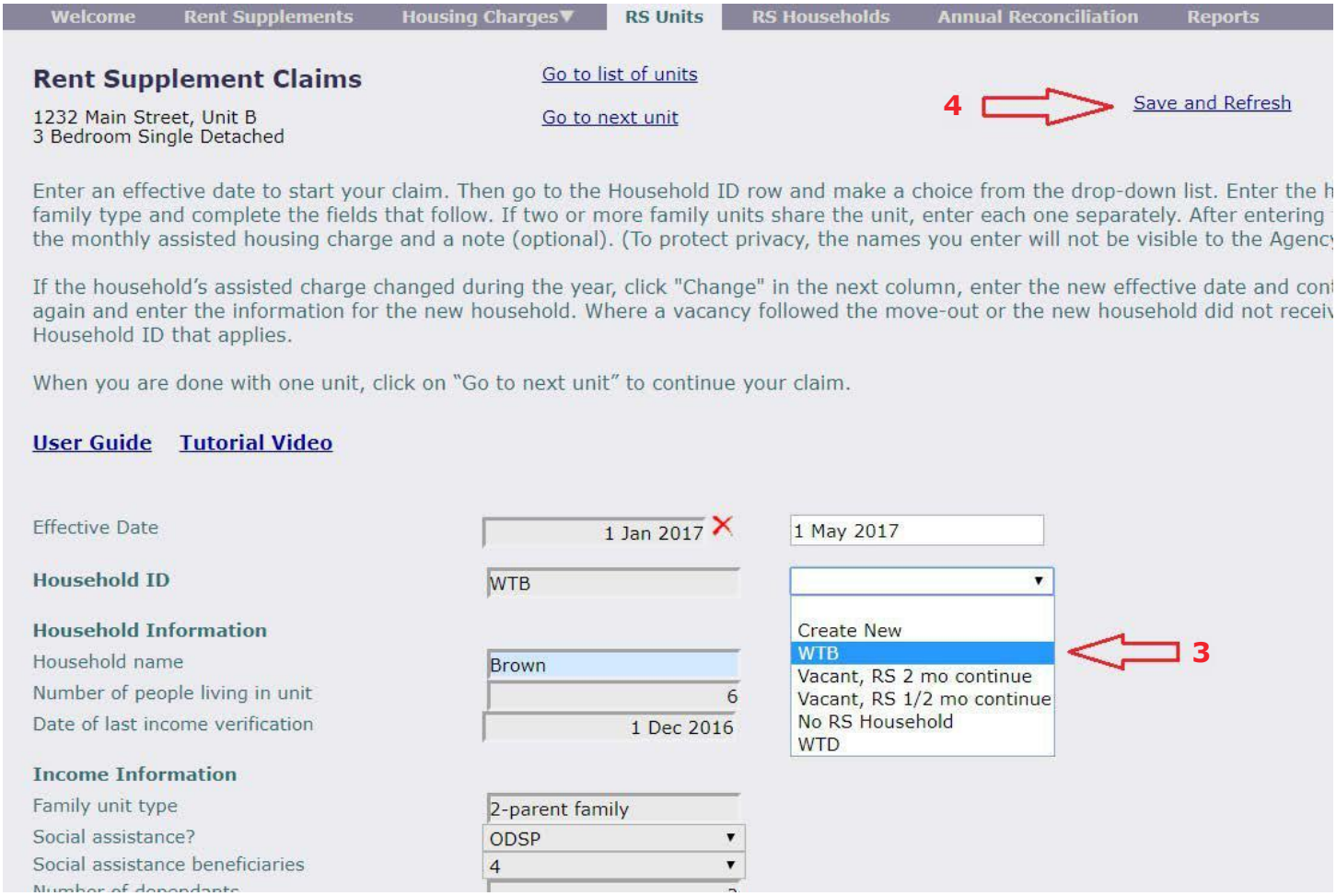
1 Click **Change**. (*right of the Effective Date columns*)

2 Select **Click to Select** to enter the **Effective Date**.



3 Select **Household ID** (*no change – same ID as on column to the left*)

4 Click on **Save and Refresh**.

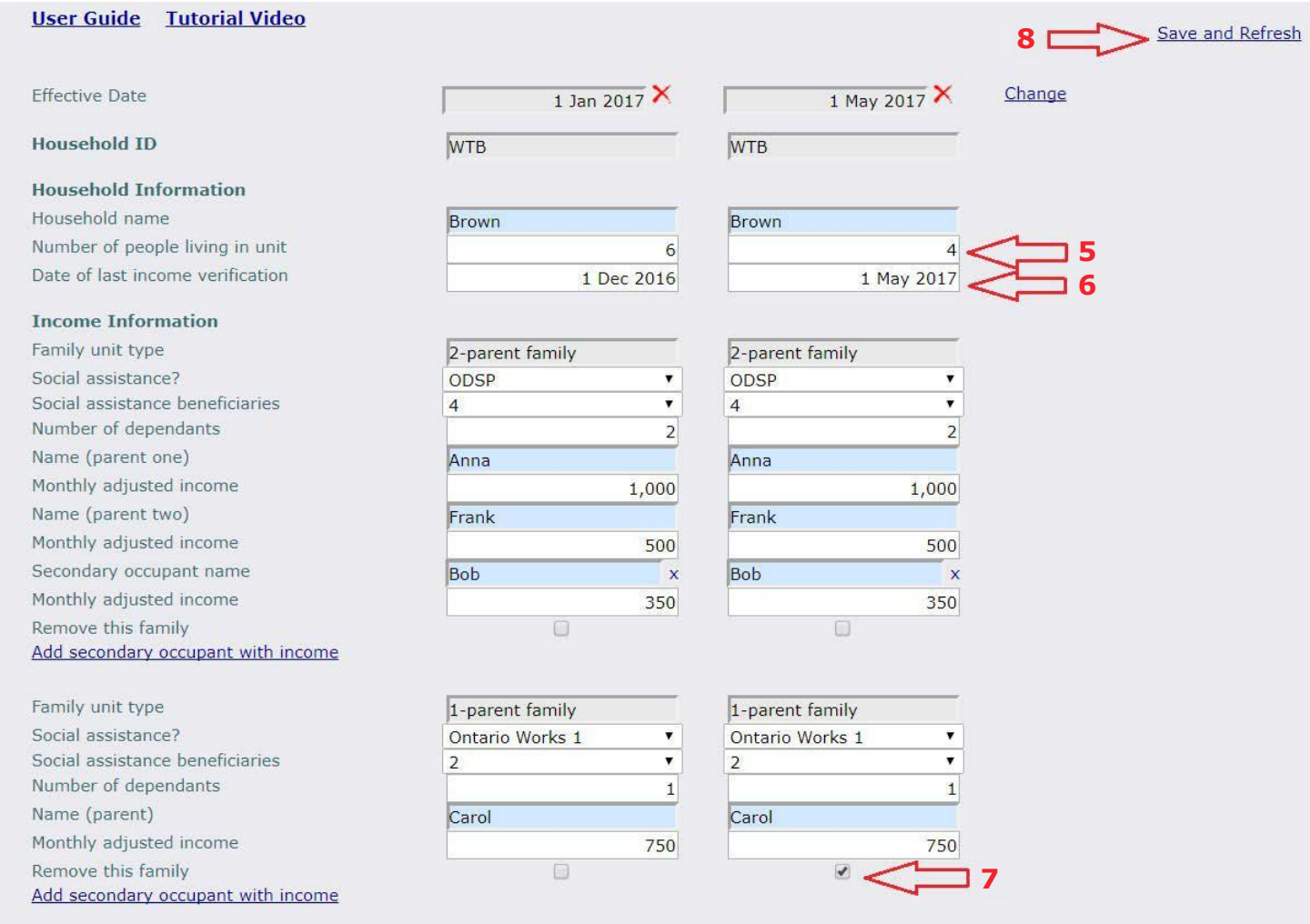


5 Update the **Number of people living in unit**.

6 Add the date of the last income verification.

7 On the **Remove this family** line, in the new column, click on the checkbox

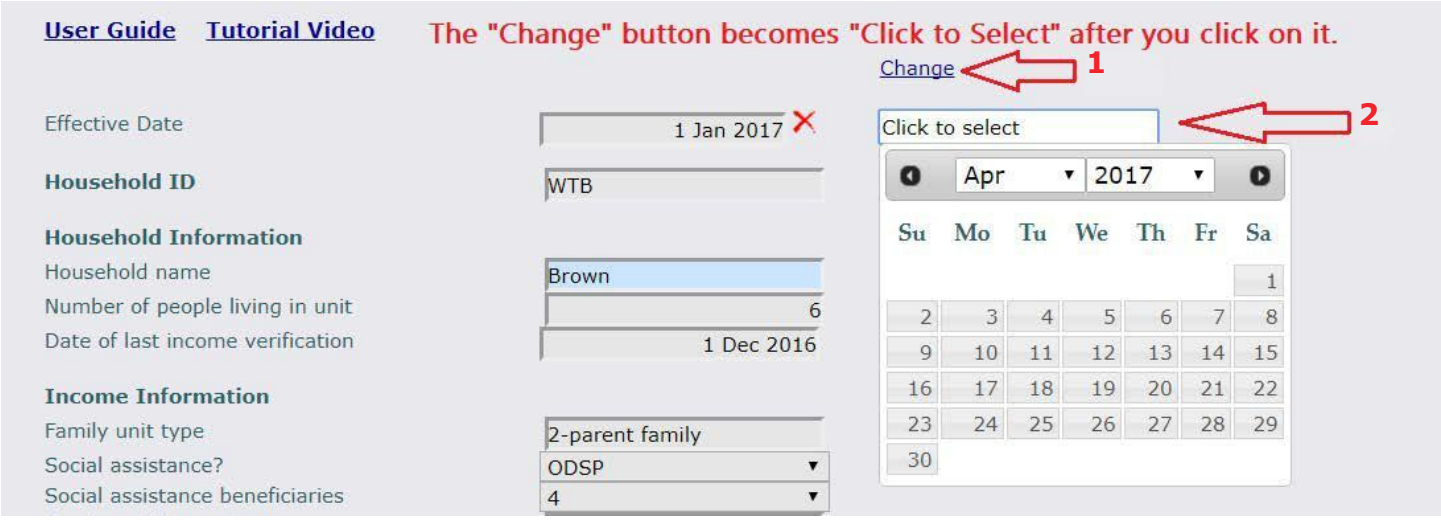
8 Click **Save and Refresh**.



Scenario 6: One of the parents from a two-parent family moves out

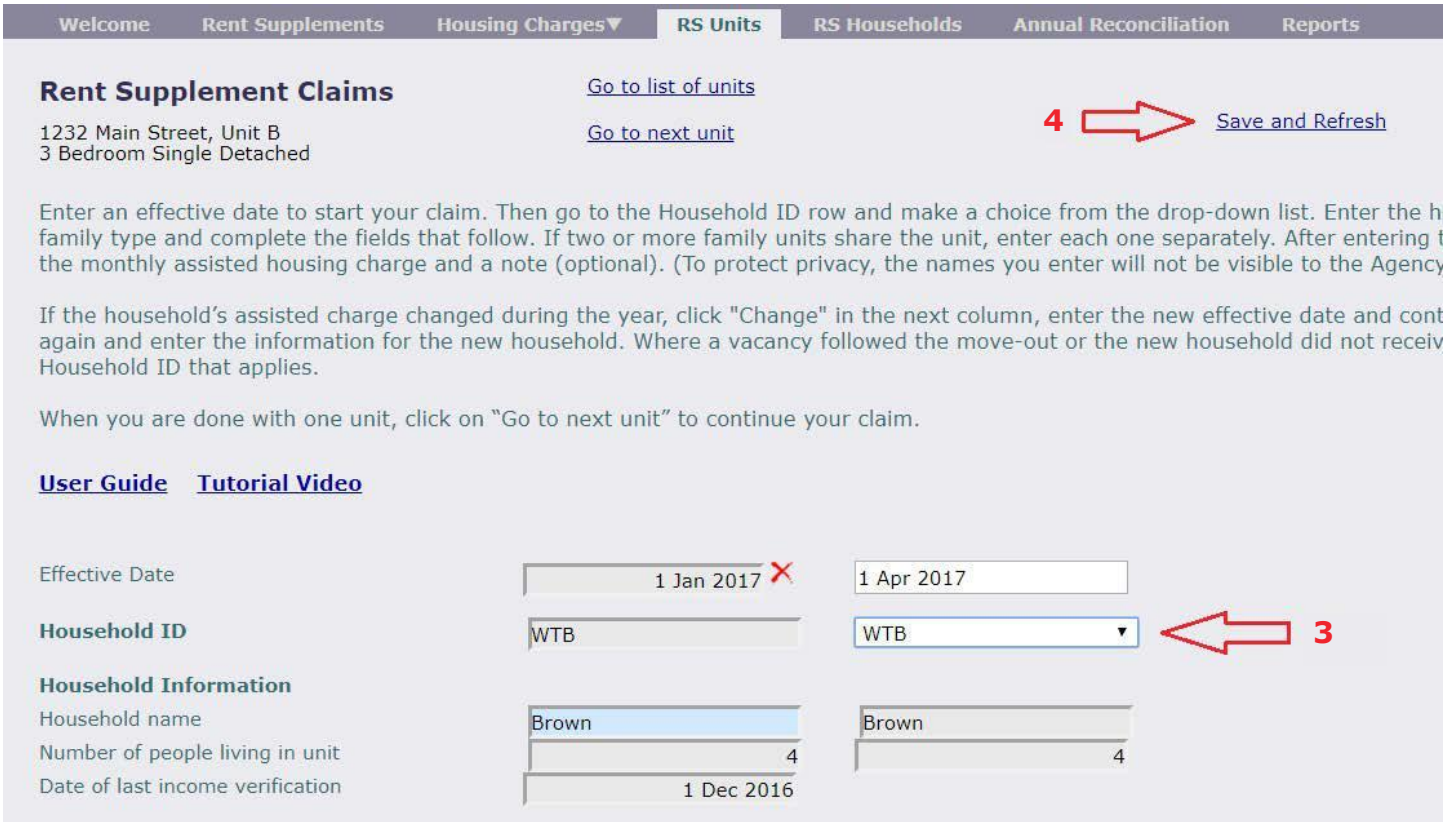
1 Click **Change**. (right of the Effective Date columns)

2 Select **Click to Select** to enter the **Effective Date**.



3 Select **Household ID** (no change – same ID as on column to the left)

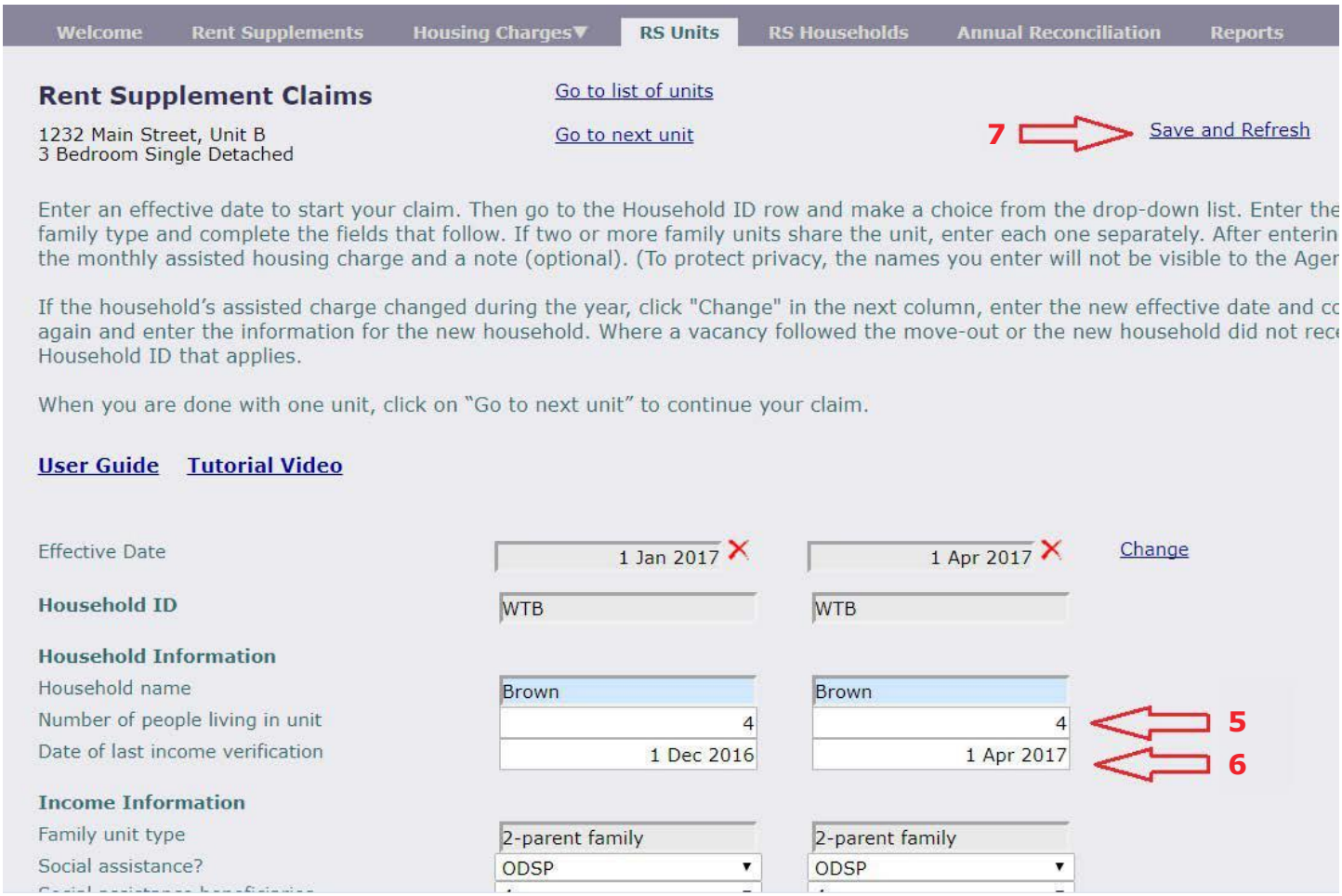
4 Click on **Save and Refresh**.



5 Update the **Number of people living in unit**.

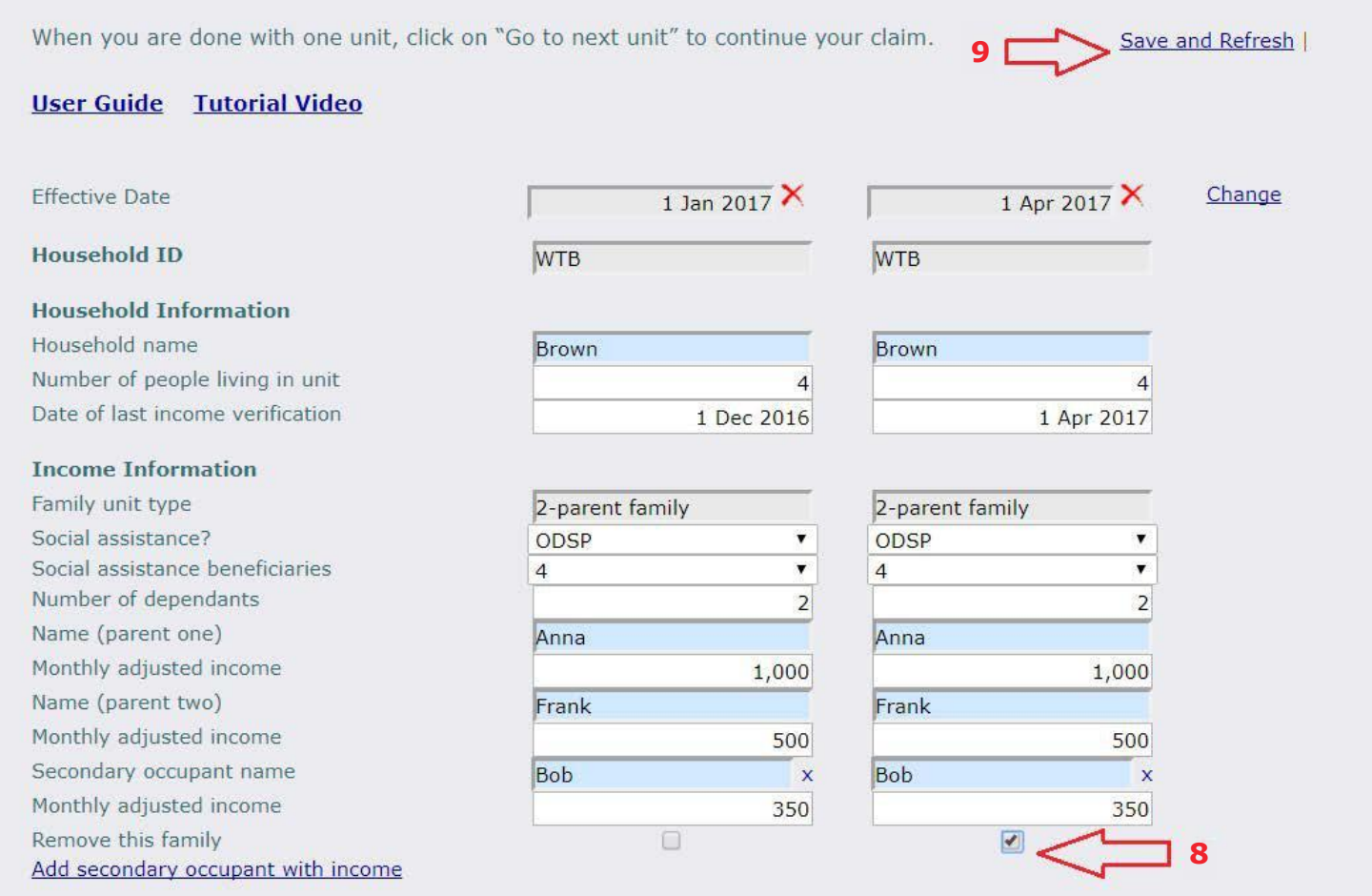
6 Add the date of the last income verification.

7 Click **Save and Refresh**.



8 On the **Remove this family** line of the **Two-parent family**, in the new column, click on the checkbox.

9 Click **Save and Refresh**.



10 Click **Add a family unit**.

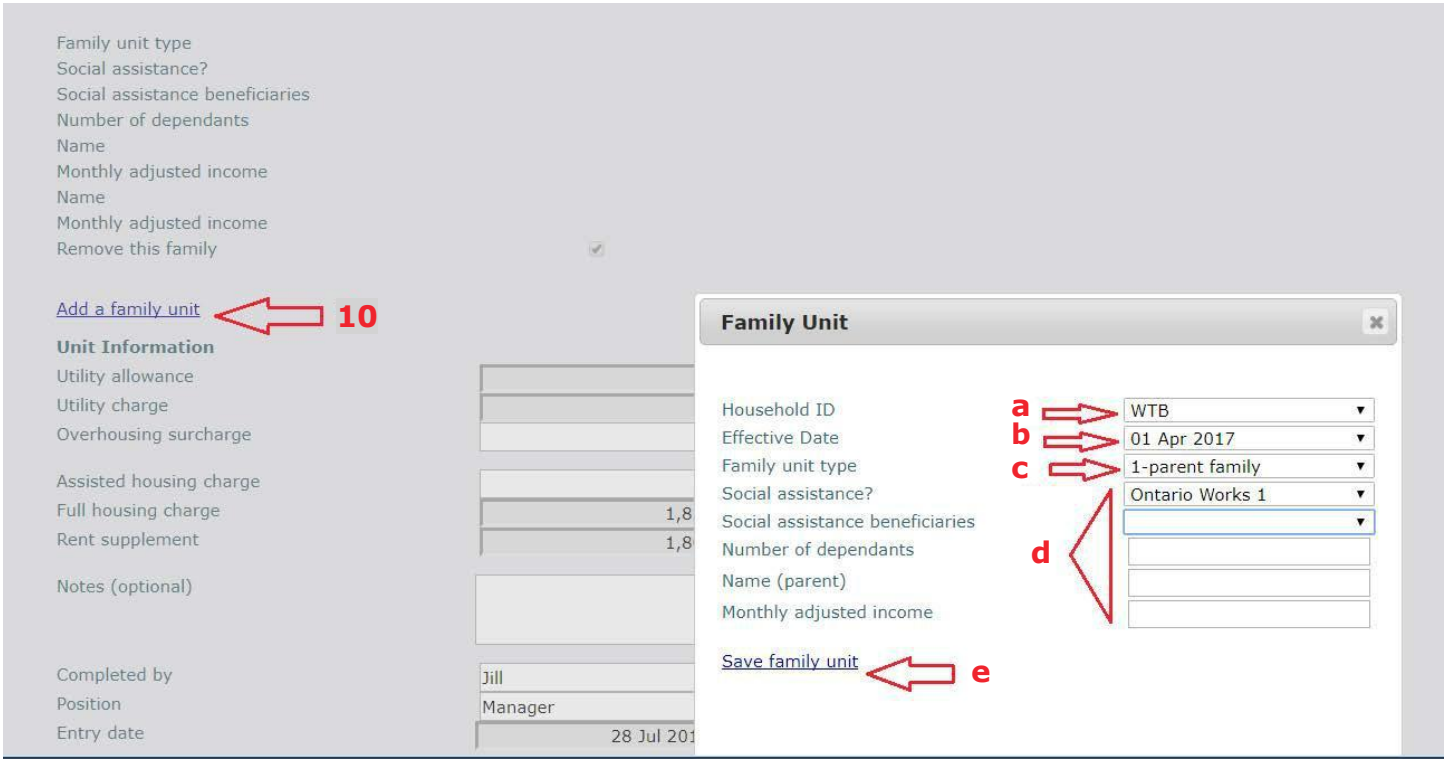
a Select the applicable **Household ID**

b Select **Effective Date**

c Select **One-parent family** from the drop-down menu.

d Complete the rest of the items for the remaining members of the family.

e Click **Save Family Unit**.



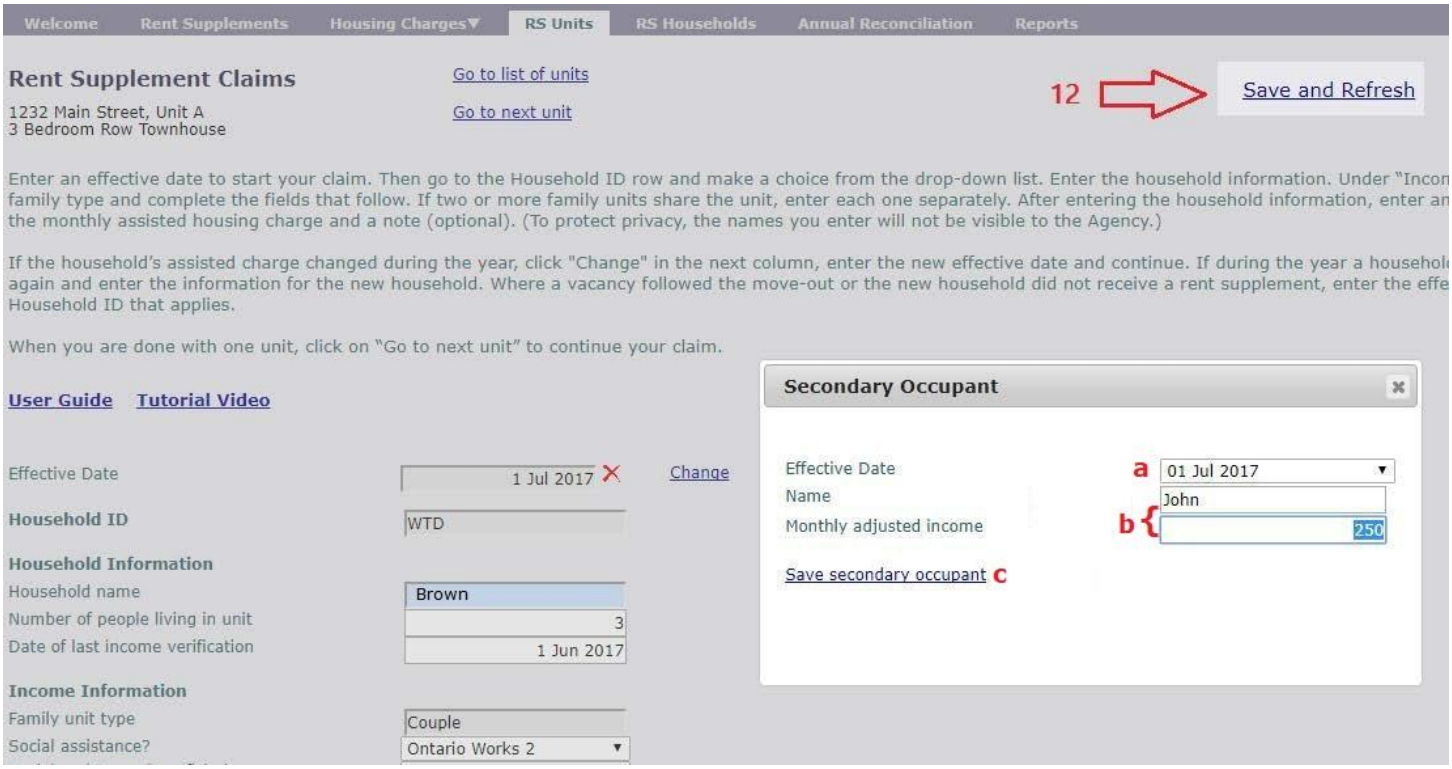
11 If applicable to one or more dependants select **Add Secondary Occupant with income**.

a Select **Effective Date**

b Enter the **Name** and **Monthly adjusted income**.

c Click **Save secondary occupant**.

12 Click **Save and Refresh**.



Scenario 7: A secondary occupant with income is added

A secondary occupant, always counted as a dependant, is also listed as a secondary occupant only if they have adjusted income. (not applicable in PEI)

Follow steps in item 11 above.

Scenario 8: Internal move of RS household

For an internal move, the date the rent supplement household moves out should not be the same date they move into the other unit.

Select the unit the rent supplement recipient is moving out of.

1. Click **Change** (to the right of the Effective Date columns).
2. Select **Click to Select** to enter the **Effective Date**.
3. Select **Household ID** (Select No RS Household).
4. Click **Save and Refresh** (top right corner).

Select the unit the rent supplement recipient is moving into.

1. Click **Change** (to the right of the Effective Date columns).
2. Select **Click to Select** to enter the **Effective Date** .
3. Select **Household ID** (Select the applicable household ID, i.e. the RS recipient moving in.)
4. Click **Save and Refresh** (top right corner).
5. Follow steps in **Income Information** (page 13)

Scenario 9: Mid-month moves

For mid-month moves, all values must be for an entire month. The program will calculate the amounts based on the move in or move out date.

1. Click **Change** (to the right of the Effective Date columns).
2. Select **Click to Select** to enter the **Effective Date**.
3. Select **Household ID** (Select No RS Household).
4. Click **Save and Refresh** (top right corner).
5. Follow steps in **Income Information** (page 13)

STEP 7: Annual Reconciliation

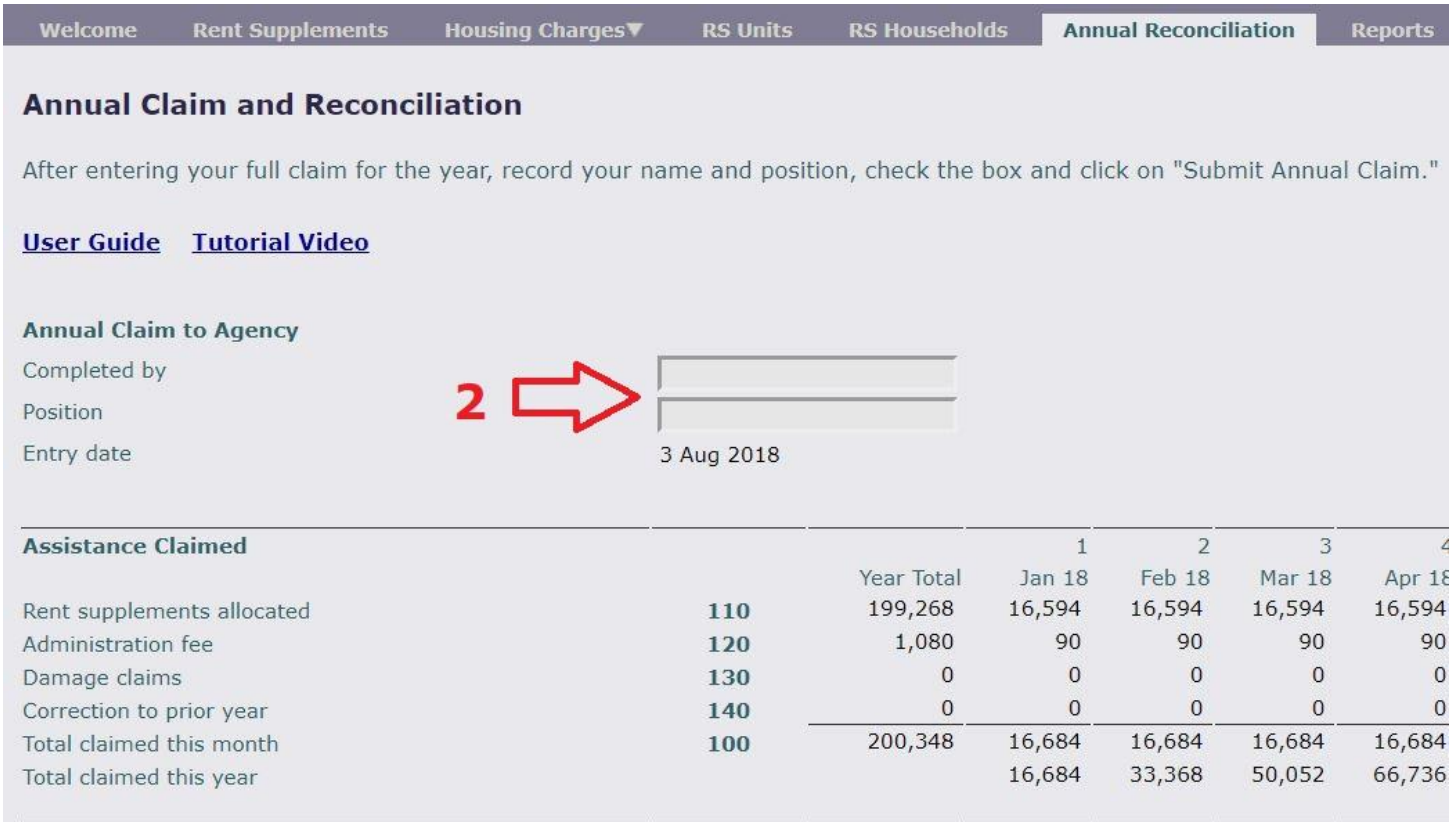
The **Annual Reconciliation** tab is where you submit your final claim to the Agency for the year. This page displays actual and projected data for the entire year.

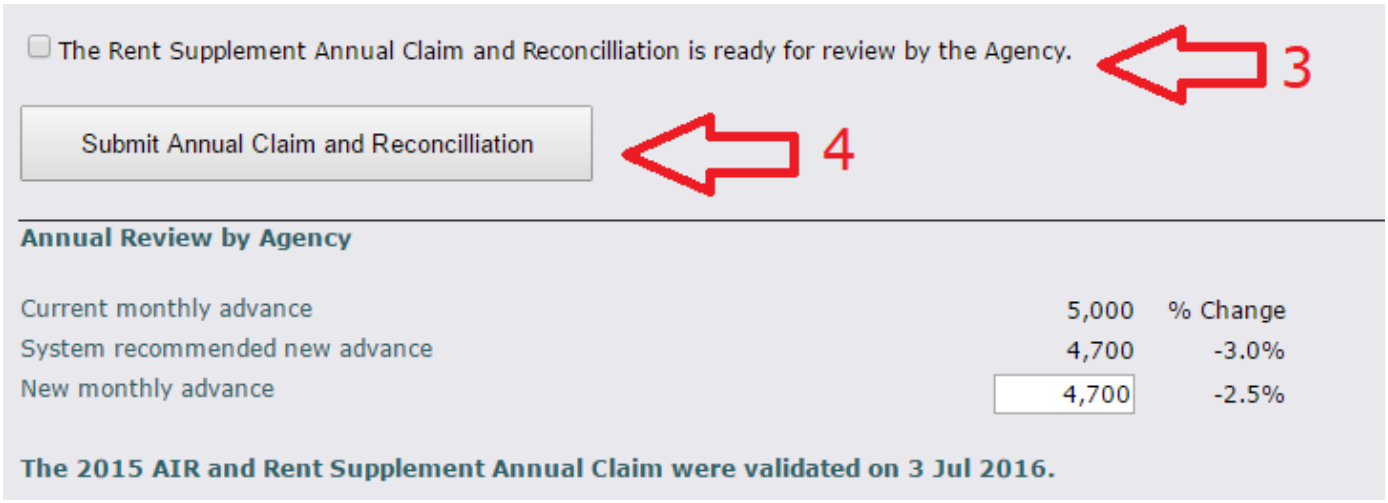
1 Before submitting your claim, ensure all the changes during the year have been entered.

2 Enter information in the **Annual Claim** to the **Agency** section at the top of the page.

3 Check the box next to The **Rent Supplement Annual Claim is ready for the Agency's review**.

4 Click on **Submit Annual Claim and Reconciliation** to submit the claim.





GENERAL INFORMATION

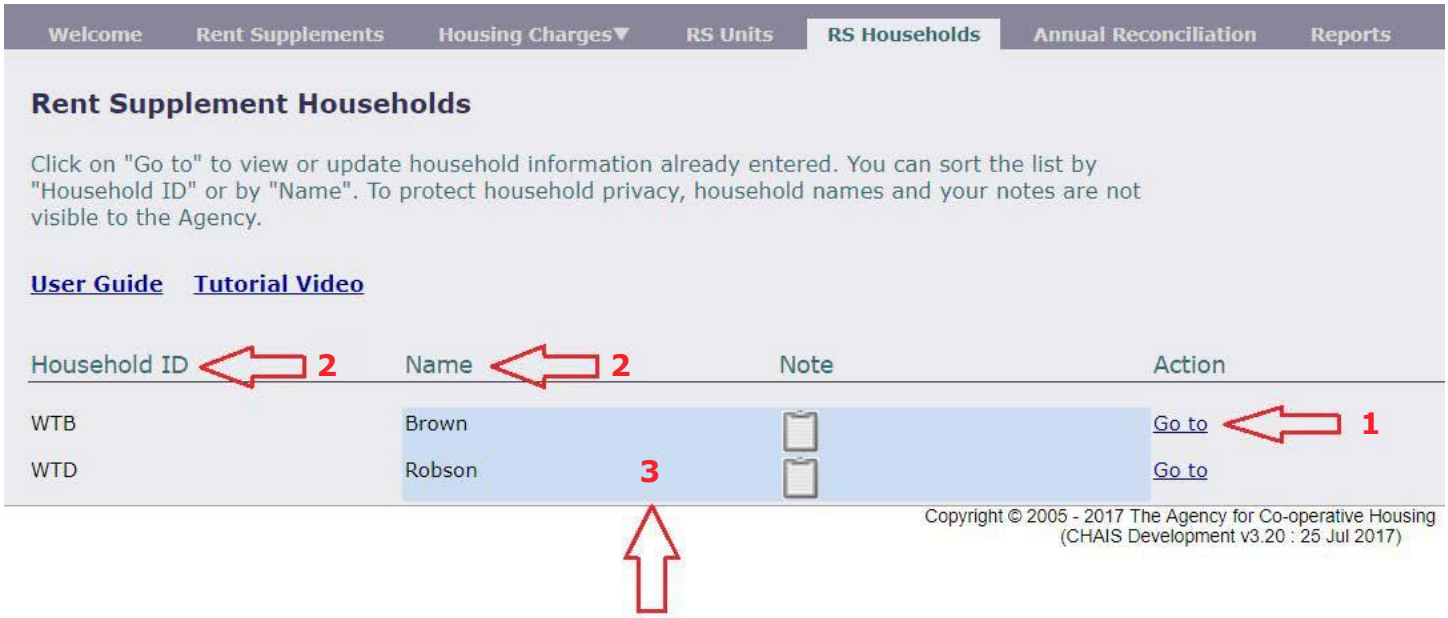
RS Households Page

This page allows you to view all households receiving rent supplement assistance that are entered in the system.

1 You can view or update household information by clicking on **Go to** any listed household and the information on this page matches your records.

2 You can sort the list by **Household ID** or by **Name** by clicking on the column titles.

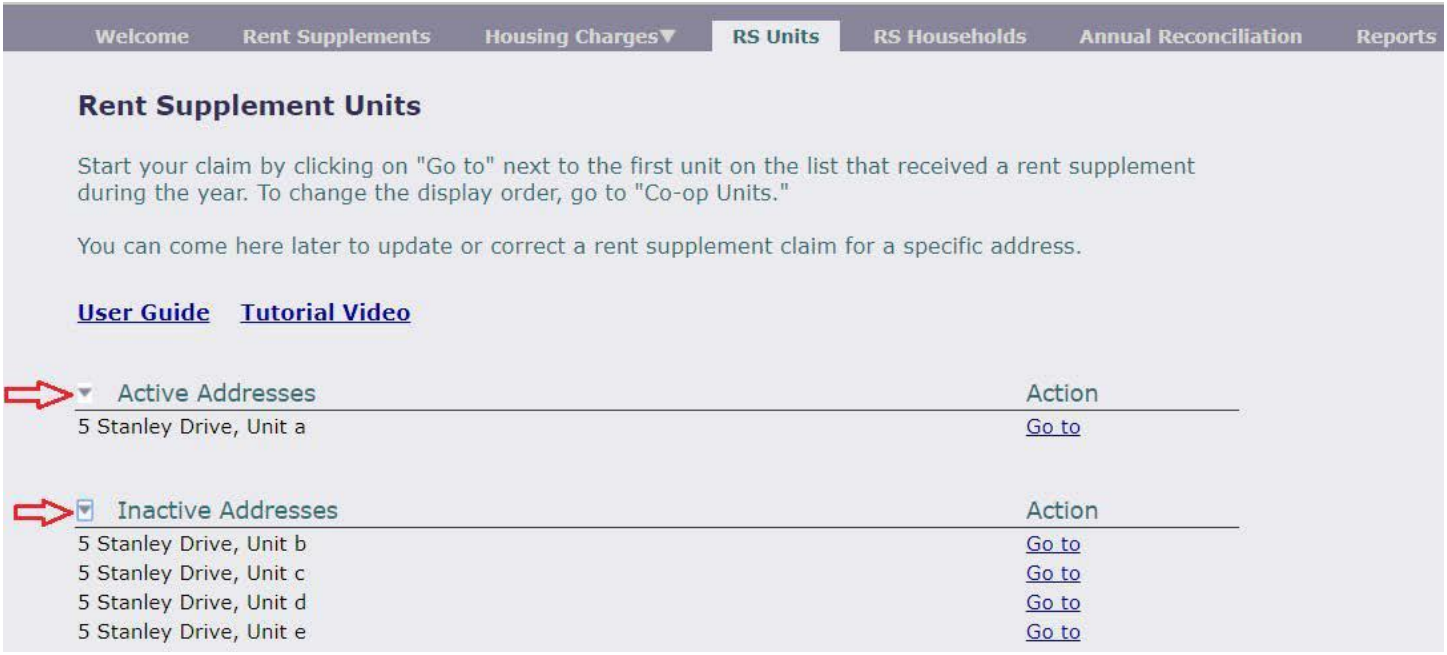
3 To protect privacy, the household **Name** and **Notes**, highlighted blue, are not visible to the Agency.



RS Units Page

This page allows you to view all units with rent supplement households.

1 You can display all units, only rent-supplement units or only non-rent-supplement units by clicking on the arrows to the left of the titles.



Rent Supplement Reports

Rent Supplement reports are available from the on-line software and are available to download as a PDF file. These reports are useful for comparing information you have entered in the system with the co-op's records.

1 Select the **Reports** tab.

2 Select the report you want to generate from the available reports.

3 If applicable, enter the parameters such as the household or unit for which you want a report.