

# SMIS Housing Checklist

This checklist contains prompts for supporting clients to access housing in the private market, social housing, and supportive housing. Please feel free to ask the questions in whatever way feels most comfortable for you.

Additional resources to support system navigation can be found in the Appendix of this document.

Personal Information			
First Name*	_____	Last Name*	_____
Also known As	_____	Date of Birth*	_____
Gender*	_____	Pronouns*	_____
Phone	_____	Email	_____
Comments/Details			
_____			
_____			
_____			
_____			
_____			

Financial Information	
Source of Income	_____
Estimated Monthly Income	_____
Rent Amount Client Feels They Can Afford	_____
Last Taxation Year A Client Has Filed A Return For	_____

## Documents on Record

Each housing application type has different document requirements. At a minimum, you should include a [Status in Canada document](#), a photo ID, and a Notice of Assessment from the most recent tax year for each adult member of the household. If you do not have these documents, you may upload substitutes – for example, a letter from the ID clinic confirming an application is in process, or a T5 instead of a Notice of Assessment. Please note that not all programs will accept these substitutes.

### Identification on Record

 Please make sure to upload client ID to the Attachments section in SMIS.

Identification Type	Date File Updated	Expiry Date

### Housing Documents on Record

 Please make sure to upload Housing Documents in the Attachments section in SMIS.

Document Type	Date

## Housing Applications

Application	Has Client Applied	Eligibility Date	Date Updated	App. No.	Notes

### Access to Housing (Rent-Geared to Income)

City of Toronto shelter workers can search for an existing Rent-Geared-to-Income (RGI) application in the [MyAccessToHousingTO](#) system, using client name, phone number, applicant code, or previous TAWL number. Workers can also make updates on behalf of a client, upload documents, and initiate the process for adding a Disadvantage (DA) priority to the file by adding a note to the file. Please see Appendix for additional information.

Does the client have access to the applicant portal?

Yes

No

N/A

Client's email address that was used to register with Access to Housing Portal

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### Active Application

Notice of Assessment for current taxation year submitted to Access to Housing?

Yes

No

N/A

If yes, date submitted:

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## Arrears

Client has arrears with a social housing provider  Yes  
 No  
 N/A

If yes, who is the arrears with? \_\_\_\_\_

Client has an active arrears repayment plan  Yes  
 No  
 N/A

## Priority Access

The client may be eligible for priority access if they are (a) a [survivor of domestic abuse or human trafficking](#), or (b) if they are [terminally ill](#) with less than two years to live. Clients who are chronically homeless may also be eligible for a Disadvantage (DA) priority. One in every seven RGI units is offered to an applicant with a DA priority designation.

Disadvantage (DA) priority designation requested in the application  Yes  
 No  
 N/A

## Population-Based and Housing Stability Supports and

Please assist clients to connect with resources and services they may be eligible for and are interested in accessing. The Appendix includes a list of **Population-Based Supports** covering some specific financial and housing-related resources available to people who are Indigenous, people who are military veterans, newcomers and people who are claiming refugee status in Canada, and people who are turning 65.

The Appendix also provides details on some of the most commonly used **Housing Stability Supports**, including the Housing Stabilization Fund (HSF), housing allowances, follow-up supports, trusteeships, public guardianships, and others.

# SMIS Housing Checklist - Appendix

## To Do List

To complete this module, please ensure:

### ✓ **Income**

- Client has a source of income.

### ✓ **ID & Documents**

- Client has Status in Canada documentation and a photo ID with a valid expiry date. For a list of status documents, visit the City of Toronto's [Acceptable ID](#) page. If the client is missing ID, or had expired ID, please assist them to replace it. For a Birth Certificate, Verification of Status, or Ontario Health Card, connect the client with an [ID clinic](#). For a driver's licence or Ontario Photo Card, refer the client to [Service Ontario](#). For an [Indigenous Status Card](#), please follow the steps required by [Indigenous Services Canada](#). The [SCIS Photo app](#) allows you to take and submit photos. It can be downloaded to a smartphone for free.
- Client has a Notice of Assessment from the most recent taxation year. If the client has not yet completed their tax return, refer them to a [tax clinic](#). Ensure they have their tax information slips, Social Insurance Numbers, and identification.

### ✓ **Housing Application**

- Client has an active [Access to Housing](#) application. Check the eligibility date (the date the client's application became active) and support the client to submit their Notice of Assessment and any other requested information to ensure the application stays active. Ensure the applicant has applied for any priority status they may be eligible for (i.e. [homelessness status](#), [Terminally Ill](#) status or [Special Priority Program](#) status for survivors of domestic abuse or human trafficking).
- Client either does not have arrears with a social housing providers, or if they do have arrears, they have an active repayment plan in place.
- Client has applied for any other housing opportunities they may be eligible for and interested in.
- Encourage the client to sign up for [MyAccessstoHousingTO](#) to receive emails regarding vacancies and explain the choice-based offer process.

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### Choice-Based

On November 30, 2021, Access to Housing launched a pilot to introduce a choice-based housing offer process to a small number of applicants on the Centralized Waiting List. Clients will now get an email to invite them to log onto [MyAccesstoHousingTO](#) and express interest in vacant units. As a caseworker, you are able to view the available vacancies through the Partner's Portal and help applicants express interest in units. Clients can express interest in more than one unit. It's important to note that the expression of interest cycle is every two weeks. If a client is not successful in a cycle, they can express interest in the following cycles until they secure housing. For more information visit: [MyAccesstoHousingTO](#).

### Single Offer Rule

In compliance with the *Housing Services Act*, the City has moved to a Single Offer Rule. This means that as of January 1, 2022, Access to Housing applicants will be eligible to receive only one offer of suitable RGI housing. If the applicant refuses the offer, they will be removed from the Centralized Waiting List. While applicants are eligible to re-apply, they will receive a new application date and will start at the bottom of the Centralized Waiting List.

As of January 2022, all RGI vacancies dedicated to the Centralized Waitlist will be filled through the Choice-Based module.

### Active Application

The "eligibility date" is the date that the application was received and approved. This date, along with any priority status on the file, determine the applicant's ranking on the wait list. The client will be required to participate in an annual review process, and provide updated information including a Notice of Assessment.

## Population Based Supports

- If the client identifies as Indigenous, please ensure they are aware of possible resources available through Indigenous [housing providers](#) and [support services](#).
- If the client is a refugee claimant or newcomer to Canada, the client may need assistance to [navigate the system](#), connect with [legal services](#), apply for [work or study permits](#), access [Ontario Works](#), or find [employment](#).
- If the client has services with the Canadian military or RCMP, please assist them to connect them with financial and housing [supports for veterans](#).
- If the client is 64 years old or older, please assist the client to apply for [Canada Pension Plan](#) (CPP) and check their eligibility for [Old Age Security](#) (OAS) and [Guarantee Income Supplement](#) (GIS).

## Housing Stability Supports

There are number of resources and services that can support housing stability. Please assist clients to connect with programs they are eligible for and interested in accessing.

### Housing Stabilization Fund (HSF)

**Eligibility:** Clients receiving Ontario Works (OW) or Ontario Disability Support Program (ODSP) income may be eligible. [Eligibility rules](#) have been revised during Covid. Check with the client's worker for updated information. Ask client for the date that they last received HSF funds, and the amount that they received.

**To Apply:** The client or (with consent) the referring worker should contact the client's OW or ODSP worker.

**Description:** HSF funds may be issued to OW/ODSP clients to help with (a) last month's rent, (b) purchasing household items, (c) rental arrears, (d) energy arrears, (e) moving costs within the province of Ontario, (f) beds and encasements (for babies outgrowing cribs or new children joining the family), and (g) beds and soft furniture following bed bugs treatment. For more information, please visit the [HSF webpage](#).

### Housing Allowance

**Eligibility:** Housing allowance area available to clients who have been experiencing chronic homelessness in Toronto. Chronic homelessness is defined as a total of at least 6 months (180

nights) over the past year, or at least 19 months (546 nights) over the past 3 years. Please note that "chronic homelessness" includes street homelessness and stay in emergency shelters, but not couch surfing. Applications for this stream should be submitted through a City-funded shelter or Streets to Homes. This benefit is not available to the general public.

**To Apply:** Only agencies confirms as referring partners may submits an application on a client's behalf. To assist a client to apply through the chronic homelessness stream, please visit:  
<https://s.cotsurvey.chkmkt.com/?e=168841&d=e&h=BF92A5C99B14600&l=en>

**Description:** A housing allowance subsidizes the rent for eligible households. It is paid directly to the tenants or the landlord, so it can be used in the private market, and it is portable, within Toronto. Demand for allowances is always greater than supply so they have been targets to specific groups, including people who are experiencing chronic homelessness. For more information on housing allowances, please visit: <https://www.toronto.ca/community-people/employment-social-support/housing-support/subsidized-housing-housing-benefits/>

## Bridging Grant

**Eligibility:** At this time, Bridging Grants are only available in conjunction with the Housing Allowance Benefit (see above). Applicants who are in receipt of OW or ODSP must access Housing Stability Fund (HSF) first. A person can only receive a bridging grant once. Ask if they have previously received a bridging grant or rent arrears assistance through Coordinated Access (CA) or through the Eviction Prevention in the Community (EPIC) program.

**Description:** A bridging Grant provides financial assistance to help bridge a new tenancy. A bridging Grants is a one-time grant up to \$2500 to help secure a rental unit by paying the first and last month's rent and a key deposit, is applicable.

## Follow Up Supports

**Eligibility:** Eligibility varies depending on the program and agency providing services.

**To Apply:** To apply through Coordinated Access:  
<https://s.cotsurvey.chkmkt.com/?e=190690&h=BA24576F60A6C0B&l=en>

**Other Application Pathways:** Coordinated Access can connect the client to a range of follow-up service providers. You may also apply directly to agencies that provide these supports. If you are applying directly, please note that Indigenous clients may prefer to connect with Indigenous organizations.

**Description:** Follow Up Supports focus on stabilizing and maintaining tenancy with clients who have exited homelessness. Supports may include, but are not limited to, community orientation; landlord relations and supporting the tenant to fulfill their tenancy obligations; and referrals to services (e.g. mental health, medical, settlement services). Coordinated Access uses a matching process to connect clients to the service providers that can best meet their needs and levels of support.

## Voluntary Trusteeship

**Eligibility:** Eligibility varies depending on the program and agency providing services. To apply through Coordinated Access, eligible clients may be chronically homeless, at risk of homelessness, youth, Indigenous or leaving an institution.

**To Apply:** To apply through Coordinated Access:  
<https://s.cotsurvey.chkmt.com/?e=190690&h=BA24576F60A6C0B&l=en>

**Other Application Pathways:** You may also assist the clients to apply directly for Voluntary Trusteeship services offered by a range of community agencies.

**Description:** Voluntary Trusteeship is a service in which clients give administrative responsibility of their finances to a trustee. Services may include regular payments for rent, utilities, and debt servicing; assistance with budgeting and saving; and regular provision of agreed-upon amounts to the clients for their own use.

## Public Guardianship

**Eligibility:** Individuals who have been [assessed by an investigator](#) with the Office of the Public Guardian and Trustee (OPGT) as being "mentally incapable adults who are suffering, or at risk of suffering, serious harm," where there is "no less intrusive alternative available" and there is "evidence that guardianship will be able to meet the person's need".

**To Apply:** Contact the OPGT by telephone: 416-327-6348; toll-free telephone: 1-800-366-0334; TTY 416-314-2687 or email: [jus.g.fjs.pgt.guardianshipinvestigation@ontario.ca/](mailto:jus.g.fjs.pgt.guardianshipinvestigation@ontario.ca/).

**Description:** The [Office of Public Guardian and Trustee](#) "manages financial decisions and conducts transactions on behalf of individuals deemed 'mentally incapable.' This includes receiving and depositing income, making investments, maintaining and selling property, applying for benefits, filing tax returns, paying bills and acting in legal proceedings if required. Severe self-neglect, physical abuse and financial exploitation of incapable people are some of the problems that this service can, in certain circumstances, help to resolve."

## **Furniture Bank**

**Eligibility:** The Furniture Bank supports families and individuals experiencing "[furniture poverty](#)."

**To Apply:** Referrals can be made through one of over [140 agencies and shelters](#) that partner with the Furniture Bank.

**Description:** The Furniture Bank collects gently used furniture from the community and transfers them to individuals and families transitioning out of homelessness or displacement. Note: in response to the COVID 19 pandemic, the City of Toronto has expedited efforts to move people to permanent housing. This commitment has required an increase in Furniture Bank's services. Effective immediately, the Furniture Bank's resource will be focused on this priority and all referring agency requests will be put on a waiting list until further notice. For further information, visiting the [Furniture Bank website](#).

## **Other Supports**

The City of Toronto's [Service and Benefit finder](#) tool can provide a personalized list of benefits that the client may be eligible for, include help with child care, employment, housing and living expenses.