



## Supporting Documentation Checklist for Temporary Rate Reduction Applications

A temporary rate reduction is a time-limited reduced rate for clients receiving home and community care services who would experience serious financial hardship if they were to pay their client rate. If you are eligible to apply for a temporary rate reduction, your responsible assessor will work with you to complete an application form. You are required to submit documents to verify the income and expenses that you claim on your application form, for both you and your spouse (if applicable). This checklist will help you prepare the necessary documents before your meeting with your responsible assessor so your application can be completed and processed as quickly as possible.

### Income

Document	Income Information	Additional Information
<input type="checkbox"/>	Notice of Assessment from the Canada Revenue Agency (CRA)	Notice of Assessment should be the most recent available. If you do not have a Notice of Assessment, talk to your responsible assessor.

### Allowable Expenses – Housing

For your primary residence only. If you are in a long-term residential care or assisted living facility, primary residence is for your spouse/dependents living in the community only. Some expenses may change over the course of the year; please provide enough information so your responsible assessor can determine an average monthly cost for the year.

Document	Expense	Accepted Documentation	Additional Information
<input type="checkbox"/>	Mortgage/Rent	Bank statement, tenancy agreement	
<input type="checkbox"/>	Property taxes/Condo fees	Invoice, receipt, bank statement, cancelled cheque	
<input type="checkbox"/>	Water charges	Invoice, receipt	
<input type="checkbox"/>	Hydro/Heat charges	Invoice, statement from facility	If receiving assisted living services, client can claim up to \$15 per month for the hydro/heat surcharge.
<input type="checkbox"/>	Garbage charges	Invoice, receipt	
<input type="checkbox"/>	Homeowner's or renter's insurance	Statement from insurance company, receipt	If receiving assisted living services, client can claim renter's insurance for their assisted living unit.



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### Allowable Expenses – Medical

If you have dental and extended health insurance, only the non-reimbursable portion can be claimed. Please provide a statement showing what amount was reimbursed by the insurance company and what amount was paid by you.

Document	Expense	Accepted Documentation	Additional Information
<input type="checkbox"/>	Medical Services Plan (MSP) premiums	MSP premium invoice	
<input type="checkbox"/>	Dental and extended health insurance premiums	Statement from insurance company, paystub	
<input type="checkbox"/>	Prescription drugs	Statement from insurance company, original receipt	Non-prescription drugs are not allowed.
<input type="checkbox"/>	Dental care	Original receipt	
<input type="checkbox"/>	Medical transportation services	Invoice, original receipt	If receiving long-term residential care or assisted living services, client can claim medical transportation services.
<input type="checkbox"/>	Medical equipment/supplies	Invoice, original receipt	If in a facility, client cannot claim medical equipment or supplies provided by the facility.
<input type="checkbox"/>	Prescribed special food and dietary supplements	Original receipt	

### Allowable Expenses – Financial

Document	Expense	Accepted Documentation	Additional Information
<input type="checkbox"/>	Canada Pension Plan (CPP) deductions	Paystub	
<input type="checkbox"/>	Employment Insurance premiums	Paystub	
<input type="checkbox"/>	Payments dictated by the courts	Legal document	
<input type="checkbox"/>	Public Guardian and Trustee commissions	Statement, receipt	

### Other Exceptional Expenses

Other exceptional expenses may be allowed in certain circumstances. These exceptional expenses must be approved by an authorized individual within the health authority. You must provide valid supporting documentation to verify the amount(s) claimed. Please speak to your responsible assessor if you believe you have exceptional expenses that should be considered.