



MUNICIPAL – FINANCE WORKING GROUP HOME OWNER GRANT APPLICATION FORM SUGGESTIONS SUMMARY

Introduction

- Finance asked the Municipal-Finance Working Group for ideas for changes to the draft Home Owner Grant application form that would:
 - ▣ improve applicants' understanding of the eligibility rules, and
 - ▣ increase the likelihood the form will be completed correctly.
- This document summarizes the comments received.
- The working group is collaborating on the home owner grant information to provided with the tax notice. Some of the comments received on the draft form have been identified for consideration for that material.
- Comments regarding the collection of SIN and the consent language on the draft form have not been included in this document because of the subsequent decision not to collect SIN.

Instructions section

Comments	Outcome
<p><i>Bold the following text “ Send your completed application to the address on your tax notice”</i></p>	<ul style="list-style-type: none">• Instead of bolding the text, we have moved the text into a more prominent position in the instructions. If that approach is found to be unsatisfactory, we will be considering revising the form as suggested.
<p><i>FOIPPA disclosure box- there are two phone numbers being provided. Will there also be an email address that residents can send their questions to?</i></p>	<ul style="list-style-type: none">• An email address will be included in the FOIPPA disclosure box.
<p><i>Another bullet is required to advise something along the lines of “HOGS that are denied are considered taxes outstanding and are subject to interest and penalties” or “The Home Owner Grant amount is considered taxes outstanding until a completed grant application is received and approved by the municipality. Outstanding amounts after the tax due date may be subject to the applicable penalties”... in layman’s terms so residents understand the consequences.</i></p>	<ul style="list-style-type: none">• The working group will consider including this information in the home owner grant information provided with the tax notice.

Part A

Comments	Outcome
<p><i>Can anyone be the applicant based on this statement? “If you are applying on behalf of the applicant with their permission, enter your last name, first name and telephone number below.” I am assuming this applicant cannot sign the certification? Only the “owner, or the spouse or relative of the deceased owner living in the home...” can sign the HOG form?</i></p>	<ul style="list-style-type: none">• The applicant, as stated on the form, is the “owner, or the spouse or relative of the deceased owner living in the residence”.• A person applying on behalf of the applicant signs the form.
<p><i>Street or Civic Address of Residence should be changed to Civic Address of Residence as some residents may provide their street but not their house #</i></p>	<ul style="list-style-type: none">• The wording has been revised – it now reads “Property Address (house number, street and city of residence”.
<p><i>Should Telephone be changed to Phone for all occurrences on the form</i></p>	<ul style="list-style-type: none">• The form will continue to use “Telephone number”. If that approach is found to be unsatisfactory, we will consider revising the form as suggested.
<p><i>We recognize that all municipalities may search using name, address or folio. We use Folio to ensure we have the correct record. Currently it is in the middle of Part A, can this be highlighted as mandatory as well</i></p>	<ul style="list-style-type: none">• The form has been revised to give the folio number section greater prominence.• For simplicity, the form will not highlight all the mandatory fields.• The working group will consider including information about missing information in the home owner grant information provided with the tax notice.

Part A

Comments

The line that says: “If you are applying on behalf of the applicant with their permission, enter your last name . . .etc - this implies that verbal permission would be acceptable and how can we check on that? I suggest that the words “Power of Attorney” or some such wording be included so that we can ask for a copy to have on file as we’ve always done.

I understand that a Power of Attorney has historically been required for a representative of the owner to claim the HOG on behalf. It now looks like any person with the permission of the owner could apply for the grant. Does this person require a POA for ensuring the legitimacy of their ability to claim on behalf of the owner?

I think there should be some indication in the form when a person signs as a POA or Committee.

For the section on “...applying on behalf of the applicant with their permission...” please confirm this is implied permission. We are assuming it is not required in writing.

The line that say’s “ if you are applying on behalf of the applicant...” Would the person be required to provide a POA? It’s unclear who would be able to fill this section in and would the owner still need to sign?

Outcome

- If an applicant wants someone else to apply for the grant on their behalf, they just need to give permission (verbal or otherwise).
- There will be no need for the person completing the form to indicate on what basis they are signing (e.g. as POA) or to provide documentation showing they have the applicant’s permission. They just need to provide their name and telephone number.
- The tax collector will not have to verify that permission was given.

Part B

Comments	Outcome
<p><i>In the 'Applicant information' disclaimer, "Relative" appears to be defined in the legislation as, "You're the spouse, child, grandchild, parent, brother or sister of the deceased owner"? Do Municipalities have to "vet" this? Should this be mentioned on the actual form?</i></p>	<ul style="list-style-type: none">• For simplicity, the form will continue to refer to "relative" rather than listing all the relationships that qualify as a relative. If that approach is found to be unsatisfactory, we will be considering revising the form as suggested.• Municipalities will not have to vet applicants to ensure they qualify as a relative.• The working group will consider including the definition of "relative" in the home owner grant information provided with the tax notice.
<p><i>On the first page, section 1, and referring to the line that says: "the spouse or relative of the deceased owner and at the date the owner passed away, we both occupied this residence as our principal residence".</i></p> <p><i>I would suggest that the following be added: "and I continue to live there as my principal residence". I believe that's an important part of the equation and should be clarified on the form.</i></p>	<ul style="list-style-type: none">• The form has been designed so that the requirement to "occupy this residence as your principal residence" comes before the requirement that the applicant and deceased owner "both occupied this residence as our principal residence". If that approach is found to be confusing for applicants, we will be considering revising the form as suggested.

Part B

Comments

Section 2- I believe the condition/disclaimer noted before section 1 about living and occupying this residence as the principal residence should be restated under section 2. Even though section 2 starts with “I also qualify for the additional grant ...”, there is a line separating the two sections.

If Section 2 is read in isolation from Section 1, the last bullet can be interpreted as “am a spouse or relative of a deceased owner who passed away this year and the owner would have been eligible as a senior...” without realizing they have to actually occupy the residence as their principal residence.

Or this last bullet can be rephrased as “am a spouse or relative of a deceased owner who passed away this year, and I reside on the property as my principal residence and the owner would have been eligible as a senior or a person with disabilities”

Outcome

- The form will be revised to make it clearer to applicants for the additional grant amount that they must complete and meet the requirements of sections 1 and 2. If that approach is found to be confusing for applicants, we will be considering revising the form as suggested.

Part B

Comments	Outcome
<i>There is five eligibility criteria for the additional grant amount. To assist staff helping taxpayers on the phone, could each one be labelled?</i>	<ul style="list-style-type: none">• The form will be revised so that each of the criteria will be labelled a, b, c, d and e.
<i>The disability program should provide clearer definition of the requirements so people understand that CPP disability is not the same criteria as the consent to release forms.</i>	<ul style="list-style-type: none">• The wording on the form has been updated to make it clearer that the applicant must be in receipt of provincial disability benefits.• The working group will consider including information on CPP disability in the home owner grant information provided with the tax notice.
<i>The question comes up if a person has a disability, why do they have to modify home or pay for assistance to be eligible for the grant.</i>	<ul style="list-style-type: none">• We will update the website with an explanation, which municipalities can refer to if needed.• The working group will consider including that explanation in the home owner grant information provided with the tax notice.

Part C

Comments	Outcome
<p><i>Is it possible to have the signature requirement – Part C - on Page 1 as we are concerned that residents may forget to sign it as it is not highlighted apart from the surrounding text, they may not print or provide the second page even though there is indication that the form continues on Page 2</i></p>	<ul style="list-style-type: none">• The form has been revised so that Part B – the home owner grant claim section - is now on page 2 with Part C.
<p><i>I also think there should be a statement giving the Collector the authority to obtain information as required to establish a claimant's eligibility to claim a HOG and related Form B.</i></p>	<ul style="list-style-type: none">• The working group will consider including information on the tax collector's authority in the home owner grant information provided with the tax notice.

Other

Comment

If as we are being told our scrutiny of the current year grant is going to become much less, why do we still have this cumbersome process of collecting and storing information from cable bills, telephone bills, bank statements in order to allow retro grants.

If a person come in our office in late December we accept the current grant with little review, but if they come in a week later in January we require them to go away and come back with extensive documentation.

Outcome

- The new Retroactive Home Owner Grant Application form will not require supporting documentation to be submitted with the application.