Quick Guide
To the Rental Assistance Online Calculator

June 2023

Contents

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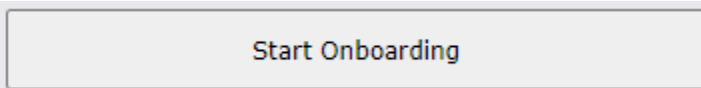
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Quick Guide
To the Rental Assistance Online Calculator

Getting Access

- Sign in through the unique link we emailed to you.
- Use the same username and password you use for your Action Plan.

Getting Started - Onboarding your First Fiscal Year End

> Start Onboarding

If you see this button at the top of the screen when you sign in, click "Start Onboarding" and follow the steps. If your co-op is already onboarded, the top button will say "Update co-op information" and you can skip the first section of this guide on the onboarding process. Instead, go to Update Co-op Information Annually.

Step 1: Housing Charges

The information here was taken from your annual information return (AIR). Review the housing charges and unit descriptions to confirm they are correct. If you need to edit the housing charges, click the pencil at the top right and make your corrections. The housing charge shown should include non-subsidized services like cable and internet. Do not include parking in the housing charge unless it is included for all households of that unit type.

Step 2: Services Included

This is where to update the services included in the different unit types (e.g., heat, hot water, electricity, cable, etc.). You will need to go through the list of unit types to mark the allowances and charges that apply to each one. To edit, click the pencil beside the unit type. Please bear the following in mind:

- Your changes will apply to all units of the selected unit type (e.g., all two-bedrooms).
- Click "Edit" at the bottom right corner to make changes to the services included.
- Checking a box means that the service is included in the housing charge.
- Do not include parking in this section unless the parking charge applies to all households in that unit type.
- If your by-laws or rules require a household to have contents insurance or a phone line for intercom entry, check the applicable boxes in the lower right corner.
- Services listed at the bottom apply to calculations with a shelter component.
- Totals for the adjustments you are making appear on the right.

Step 3: Units

This is where to assign a physical address for each unit so that when you decide to allocate rental assistance to (for example) unit 3, the Calculator will already know the housing charge and any adjustments for that unit. Once you click the pencil, you will be able to enter addresses for all the units in your co-op.

- Click "Add new unit" and enter a unit address. Keep doing this until you have added addresses for all co-op units.
- The Agency already has some information about the units in your co-op (e.g., the number of one-bedroom apartments). If our records show you have six one-bedroom units, you will only be able to list six one-bedroom units at this step. Contact your rental-assistance officer if you find a mistake.
- Once all units are entered, click "Save" and then go back to the wizard to take the next step.

Step 4: Verify Units with Households Eligible for Assistance

Click the dropdown arrow to select the households where you want to calculate the rental assistance. You might have to click the dropdown arrow after clicking each unit.

Step 5: Enter the Assisted Household

Calculate an assisted housing charge by clicking the calculator next to the unit. You will need to go through the steps below for each household receiving rental assistance.

1. Household Summary: Enter the household name, household type and number of occupants. Indicate whether anyone receives social assistance.
2. Household Details: Enter the occupant names and genders.
3. Household Income: Enter the income of each occupant. If there is a shelter component, enter it during this step.
   a. Shelter Component: Step 3a applies only to calculations with a shelter component. Here you can see the adjusted shelter component compared to the RGI amount.
4. Assisted Housing Charge: Here you can see the calculation compared to the minimum housing charge. This allows you to check that the household is not paying less than the minimum. If an over-housing charge applies, it should be entered at this step.
5. Rental Assistance: Here you can see a summary of the calculation. You will need to enter the name of the person who did the calculation and their position. Click "Return to Wizard" when you have completed the calculation.

You will need to go through Steps 1-5 for each household receiving assistance. Once all calculations show the status of "Complete," you can move to step 6.

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Step 6: Summary of Assisted Households

Here is a summary of the assistance your co-op will be giving out for one month. Clicking "Complete onboarding" will put these calculations in place for a year.

- On this screen you can adjust the RGI and also see the RGI recommended by the Agency.
- You can see your base number of assisted units and guaranteed monthly funding for assistance.
- If your co-op is assisting more than the base number of units and overspending the guaranteed amount, the Calculator will automatically assign the deepest-need households to take up the rental assistance so that you can maximize your funding and minimize internal subsidies.
- Click "Complete onboarding."

Calculate an Assisted Housing Charge

This button should be used for any changes to a household that were not included at the time of your annual review (e.g., someone moved out of the household or had a mid-year change in income).
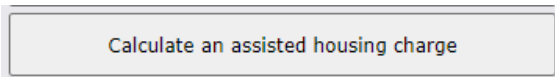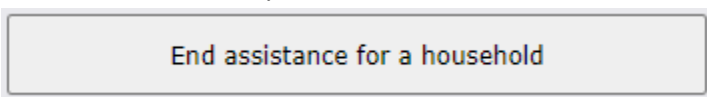

Once you have clicked the button…

- Choose the effective date of the change.
- Select the unit.
- Select the household. If the household is already receiving assistance, you will see their name in the dropdown list. If no one in the unit has received rental assistance in the past, click "Create new" to add the selected household to the assisted list.
- Follow steps one to five to enter or modify household or income information.

End Assistance for a Household

Use this button when you need to end assistance for a household mid-year.

Once you have clicked the button…

- Choose the effective date.
- Select the unit.
- Click "End assistance for a household."

Confirm Your Annual Assistance Claim

Use this button to submit your annual reconciliation to the Agency.

Confirm your annual assistance claim

Once you have entered and reviewed all information about the assisted households and you are ready to submit your claim, click this button. Please note that claims are due **two months** after your fiscal year end.

Once you have clicked this button, the following section will appear below the rental-assistance buttons:

Go to Year Ending	Status	Rent-geared-to-income level	Actions
30 Nov 2022	Ongoing	30	
30 Nov 2021	Ongoing	30	Confirm Annual Claim
30 Nov 2020	Submitted	30	View Claim Reconciliation

Click "Confirm annual claim" for the fiscal year end you would like to submit a claim for.

- Review the information in the claim to ensure it is correct and lines up with the assistance your co-op has given out over the fiscal year.
- Make changes to your calculations if any information in the claim is incorrect (e.g., if a mid-year change in income was not entered).
- Enter the name and position of the person submitting the claim. Your rental-assistance officer will follow up with this person if they have questions about the claim.
- Check the box that indicates your reconciliation is ready for Agency review.
- Confirm your annual claim by clicking the button below.

Client Review of Reconciliation

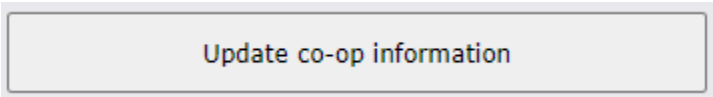| Completed by | John Smith |
| Position | Bookkeeper |

☑ Our assistance reconciliation is ready for the Agency's review.

Confirm Annual Claim

Your co-op's information will carry forward to the next year once you have entered it either through the onboarding process in your first year under the Rental Assistance Program or through a mid-year change.

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Update Co-op Information Annually

This is the process you will follow for each year under the Rental Assistance Program. The Calculator will carry forward information from the previous year but you will need to review and update it annually. Follow these steps when you are doing your annual review and setting the updated assisted charges for the year based on the new income verifications you have collected. The "Start Onboarding" button that you originally clicked will now say "Update co-op information."

Update co-op information

Click "Update co-op information" and select the fiscal year end. The effective date will default to the start of the fiscal year you have selected. You might need to adjust the effective date if it occurs before you joined the Rental Assistance Program or if you have a different effective date.

Step 1: Housing Charges
Review the housing charges and unit types to confirm they are correct. If you need to edit the housing charges, click the pencil at the top right and make your corrections. The housing charge shown should include non-subsidized services like cable and internet. Do not include parking in the housing charge unless it is included for all households of that unit type.

Step 2: Services Included
This is where to update the services included for each unit type (e.g., heat, hot water, electricity, cable etc). In most cases, the services included will remain the same each year. If there is a change (e.g., the cable charge has increased from $30 to $40), you will need to go through the list of each unit type to make changes. To edit, click the pencil beside the unit type. Please bear the following in mind:

- Your changes will apply to all units of the selected unit type (e.g., all two-bedrooms).
- Click "Edit" at the bottom right corner to make changes to the services included.
- Checking a box means that the service is included in the housing charge.
- Do not include parking in this section unless the parking charge applies to all households living in that unit type.
- If your by-laws or rules require all households to have contents insurance or a phone line for. intercom entry, check the boxes at the lower right corner.
- Services listed at the bottom apply to calculations with a shelter component.
- Totals of the adjustments you are making show on the right.

Confirm that the unit addresses and types have not changed and move to the next step.

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Step 4: Verify Units with Households Eligible for Assistance

Click the dropdown arrow and ensure the correct households are selected to receive rental assistance. If a new household is receiving assistance, check the box next to their unit. You might have to click the dropdown arrow after clicking each unit.

Step 5: Enter the Assisted Household's Charge

Calculate an assisted housing charge by clicking the calculator next to the unit. You will need to go through the steps below for each household receiving rental assistance.

1. Household Summary: Confirm the household name, household type, number of occupants and indicate whether any of them receives social assistance. Make changes as needed.
2. Household Details: Confirm occupant names and gender.
3. Household Income: Confirm or update income for each occupant. If there is a shelter component, enter it at this step.
   a. Step 3a applies only to calculations with a shelter component. Here you can see the adjusted shelter component compared to the RGI amount.
4. Assisted Housing Charge: Here you can see the calculation compared to the minimum housing charge. This allows you to check that the household is not paying less than the minimum. If an over-housing charge applies, it should be entered at this step.
5. Rental Assistance: Here you can see a summary of the calculation. You will need to enter the name of the person who did the calculation and their position. Your rental-assistance officer will follow up with this person if they have questions about the claim. Click "Return to Wizard" when you have completed the calculation.

You will need to go through Steps 1 to 5 for each household receiving assistance. Once all calculations show the status of "Complete," you can move to step 6.

Step 6: Summary of Assisted Households

Here is a summary of the assistance your co-op will be giving out for one month. Clicking "Complete onboarding" will put these calculations in place for the year.

▪ On this screen you can adjust the RGI and also see the RGI recommended by the Agency.
▪ You can see your base number of assisted units and guaranteed monthly funding for assistance.
▪ If your co-op is assisting more than the base number of units and overspending the guaranteed amount, the Calculator will automatically assign the deepest-need households to take up the rental assistance so that you can maximize your funding and minimize internal subsidies.
▪ Click "Complete onboarding."

Move a Household to Another Unit

Move a household to another unit

This button allows you to move an assisted household to a different unit when an internal move occurs.

1. Click the button and select the effective date of the move.
2. Select the new unit that the assisted household is moving into from the dropdown menu.
3. Select the assisted household that is moving from the dropdown list.
4. Click "move a household to another unit"
5. Follow steps 1-5 to confirm the information in their calculation is the same or make changes if necessary.

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