

DIRECTIVE 1.4 DATE OF GRANT

SUMMARY OF POLICY

For applicants who apply directly to an ODSP office, the effective date of grant is the date the application is complete.

For applicants who apply to ODSP through an Ontario Works office, the effective date of grant is the first day of the month following the month the application is complete.

LEGISLATIVE AUTHORITY

[Section 17 of the ODSP Regulation](#)

SUMMARY OF DIRECTIVE

This directive outlines how the date of grant is determined for applicants who require disability adjudication and for applicants who are members of a prescribed class.

Intent of Policy

To clarify the effective date of eligibility for income support.

Application of Policy

The date the application is considered complete differs depending on whether the applicant requires disability adjudication or is a member of a prescribed class. Please refer to the scenarios for details.

In extraordinary circumstances, the Director may grant prior to completion of an application, (e.g. if the application could not be completed due to a strike) or after the application is complete.

Please Note: Effective May 25, 2006 the four month limit on retroactive grants was eliminated.

The following scenarios are outlined in the directive:

1. Applicant found to be a person with a disability by the Disability Adjudication Unit (DAU). [No appeal to the Social Benefits Tribunal (SBT)].
2. SBT overturns a decision that an applicant is not a person with a disability.
3. Applicant appeals a decision of financial ineligibility to SBT.
4. Applicant is already a member of a prescribed class.
5. Applicant applies to ODSP and for disability benefits under the Canada Pension Plan (CPP-D) and becomes eligible for CPP-D before the DAU received a completed Disability Determination Package (DDP).
6. Applicant applies to ODSP and CPP-D and is granted ODSP. The recipient is then granted CPP-D retroactively to a date before the completed DDP was received.
7. Applicant applies to ODSP and to CPP-D and becomes eligible for disability benefits under the Canada Pension Plan for a date after the DDP was received.
8. DAU decision of medical ineligibility is appealed and CPP disability benefits are subsequently granted retroactively.
9. Spouse found to be a person with a disability by the DAU.
10. Dependent adult found to be a person with a disability by the DAU.

Determining Date of Grant for Applicants who Apply as Persons with a Disability and require Adjudication.

For those applying as a person with a disability, the application is considered complete on the date the DAU receives a completed DDP.

Scenario 1: Applicant found to be a person with a disability by the DAU. (No Appeal to SBT).

In this scenario, the application is complete on the date the DAU receives the completed DDP.

Example A: Self-referred applicant requiring adjudication.

ODSP Application Part 1 complete. All required information received. Jan. 1, 2007	Financial Eligibility Determined and DDP provided. Jan. 20, 2007	DAU receives completed DDP. Feb. 25, 2007	DAU determines applicant to be a person with a disability June 15, 2007
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The date of grant is the date the application was complete: February 25, 2007

Example B: Ontario Works referral requiring adjudication.

Application Part 1 completed by Ontario Works. All required information received. Jan. 1, 2007	Financial Eligibility Determined and DDP provided. Jan. 20, 2007	DAU receives completed DDP. Feb. 25, 2007	DAU determines applicant to be a person with a disability. June 15, 2007
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The date of grant is the first day of the month following the date the application was complete: March 1, 2007

Scenario 2: SBT overturns the decision that the applicant is not a person with a disability.

In this scenario, the SBT decision in the applicant's favour effectively replaces the DAU's negative decision.

The application was complete on the date the DAU received the completed DDP.

Example: Self-referred applicant: SBT overturns the decision of medical ineligibility but makes no determination regarding the date of grant.

ODSP Application Part 1 complete. All required information received. Jan. 1, 2007	Financial Eligibility Determined. DDP provided. Jan. 20, 2007	DAU receives completed DDP. Feb. 25, 2007	DAU determines applicant is not a person with a disability. June 15, 2007	SBT determines applicant is a person with a disability. Dec. 5, 2007
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The date of grant is the date the application was complete: February 25, 2007

Scenario 3: Applicant appeals a decision of financial ineligibility to SBT.

In this scenario, the local office determines that the applicant is not financially eligible. The applicant requests an internal review and subsequently appeals. Once the office has notice of the appeal, the applicant is given a DDP. This is done in the event that the SBT determines the applicant is financially eligible.

The application is complete on the date the DAU receives the completed DDP.

Example: Self-referred applicant: SBT overturns the decision of financial ineligibility.

Local Office decision of financial ineligibility.	Appeal on decision of financial eligibility confirmed. DDP provided.	DAU receives completed DDP.	DAU determines applicant to be a person with a disability.	SBT finds the applicant to be financially eligible.
May 31, 2007	June 30, 2007	July 31, 2007	Sept. 30, 2007	Feb. 5, 2008

The date of grant is the date the application was complete: July 31, 2007

Determining Date of Grant for Applicants who Apply as Members of a Prescribed Class.

The following are prescribed classes:

- Persons in receipt of disability benefits under the Canada Pension Plan;
- Persons residing in Ontario who are in receipt of disability benefits under the Québec Pension Plan;
- Applicants who are 65 years of age or older and not eligible for a pension under the *Old Age Security Act* (Canada);
- Residents in a facility designated as an institution under the *Mental Hospitals Act* or a psychiatric facility under the *Mental Health Act* (formerly designated as an institution under the *Mental Hospitals Act*).
- Residents of the Centre for Addiction and Mental Health in the City of Toronto;
- Residents of the Homewood Health Centre in the City of Guelph;
- Residents in a facility designated under the *Developmental Services Act*;
- Former residents of a facility designated under the *Developmental Services Act* who cease to be residents of that facility on or after June 1, 1998;
- Residents in a home for special care established or licensed or approved under the *Homes for Special Care Act*;
- Recipients grandparented from the Family Benefits program unless they cease to be eligible and rapid reinstatement provisions cannot be applied.

For those applying as members of a prescribed class, the application is complete on the later of:

- the date the Application Part 1 is complete (and all accompanying forms, agreements and consents have been signed, together with any required verification, including proof of membership in a prescribed class, that is within the applicant’s control have been received by the local office); and
- the date the applicant becomes a member of a prescribed class.

Scenario 4: Applicant is already a member of a prescribed class.

For those applying to ODSP who are already members of a prescribed class, the application is complete on the date the Application Part 1 is complete (and all accompanying forms, agreements, and consents have been signed, and any required verification that is within the applicant’s control has been received by the local office). In these cases, the required verification includes proof of membership in a prescribed class.

In the following example, the applicant completes the required forms and provides all the required verification including proof of membership in a prescribed class.

Example A: Self-referred applicant: A member of a prescribed class.

ODSP Application Part 1 is taken. Financial eligibility is determined. May 15, 2007	Applicant provides verification of membership in a prescribed class. May 15, 2007
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The date of grant is the date the application was complete: May 15, 2007

Note: The application is considered complete on May 15th as the applicant provided all required verification.

Example B: Ontario Works referral: A member of a prescribed class.

Application Part 1 taken by Ontario Works. Financial eligibility determined. May 15, 2007	Participant provides verification of membership in a prescribed class. May 15, 2007	ODSP receives referral from Ontario Works. June 5, 2007
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The date of grant is the first day of the month following the date the application was complete: **June 1, 2007**

Note: If the applicant applies directly to ODSP, as in Example A, their date of grant is May 15th and income support is prorated from the 15th of the month to the end of the month. If, however, the applicant is referred from Ontario Works **and** the applicant is in receipt of financial assistance at the time of grant, income support is not prorated. They are granted income support effective the first day of the following month as illustrated in Example B.

In the following example, the applicant completes the Application Part 1 and provides verification of his/her prescribed class status at a later date.

Example C: Self-referred applicant: proof of prescribed class status provided at a later date.

ODSP Application Part 1 is taken. Financial eligibility is determined. May 15, 2007	Applicant provides verification of membership in a prescribed class. May 28, 2007
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The date of grant is the date the application was complete: May 28, 2007.

Determining Date of Grant for Applicants Who Apply Both as Persons with a Disability and as Members of a Prescribed Class.

An application on the basis of being a member of a prescribed class and an application as a person with a disability are two different processes. The date the application is considered complete differs as set out below:

- For those applying as members of a prescribed class, the application is complete on the later of the date the Application Part 1 is complete (and all accompanying forms, agreements, and consents have been signed, together with any required verification, including proof of membership in a prescribed class, that is within the applicant’s control) and the date the applicant becomes a member of a prescribed class;
- For those applying as a person with a disability, the application is complete on the date the DAU receives the completed DDP.

Scenario 5: Applicant applies to ODSP and CPP-D and becomes eligible for disability benefits under the Canada Pension Plan before the DAU received a completed DDP.

In this scenario, the application process started with the applicant requiring disability adjudication. However, upon becoming a member of a prescribed class, adjudication is no longer required in this scenario.

The application is complete on the later of the date the Application Part 1 is complete (and all required information is received) and the date applicant became a member of a prescribed class.

Example A: Self-referred applicant: CPP-D decision rendered prior to DAU decision. The CPP-D decision is effective on a date before the DDP was received.

CPP-D Application Date	ODSP Application Part 1 complete. All required information received.	DAU receives completed DDP.	DAU decision not rendered.	CPP-D retro-granted effective April 1, 2007 . CPP-D eligibility letter dated June 1, 2007
Jan. 1, 2007	March 1, 2007	May 1, 2007		

- The Application Part 1 was complete on March 1, 2007.
- The applicant is a member of a prescribed class April 1, 2007.
- Therefore, the applicant is granted effective April 1, 2007.

Example B: Ontario Works Referral: CPP-D decision rendered prior to DAU decision. The CPP-D decision is effective on a date before the DDP was received.

CPP-D Application Date	Application Part 1 completed by Ontario Works. All required information received.	DAU receives completed DDP.	DAU decision not rendered.	CPP-D retro-granted effective Jan. 12, 2007. CPP-D eligibility letter dated June 1, 2007
Dec. 14, 2006	Jan. 5, 2007	Feb. 15, 2007		

- The Application Part 1 was complete on January 5, 2007.
- The applicant is a member of a prescribed class effective January 12, 2007.
- Therefore, the applicant is granted effective the first day of the month following the month the application is complete: February 1, 2007.

Example C: Self-referred applicant: CPP-D decision rendered prior to DAU decision. The CPP-D decision is effective on a date before the Application Part 1 was completed.

CPP-D Application Date	ODSP Application Part 1 complete. All required information received.	DAU receives completed DDP.	DAU decision not rendered.	CPP-D retro-granted effective Dec. 1, 2006. CPP-D eligibility letter dated June 1, 2007
Jan. 1, 2007	March 1, 2007	May 1, 2007		

- The Application Part 1 was completed on March 1, 2007
- The applicant is a member of a prescribed class effective December 1, 2006.
- Since the application is complete on the later of the date that the application Part 1 is complete and the date the applicant became a member of a prescribed class, the date of grant is March 1, 2007.

Scenario 6: Applicant applies to ODSP and CPP-D and is granted ODSP. The recipient is then granted CPP-D retroactively to a date before the completed DDP was received.

In the following examples, the date of grant will be based on the earlier of:

- the date the application was complete with respect to prescribed class status; and
- the date the application was complete with respect to applying as a person with a disability.

Example A: Self-referred applicant: Previously granted ODSP based on the date the DDP was received.

CPP-D Application Date	ODSP Application Part 1 complete. All required information received.	DAU receives completed DDP.	DAU determines applicant to be a person with a disability.	CPP-D retro-granted effective April 1, 2007 . CPP-D eligibility letter dated Sept. 1, 2007
Jan. 1, 2007	March 1, 2007	May 1, 2007	July 20, 2007	

- The DDP was received on May 1, 2007.
- The initial date of grant is May 1, 2007.
- As a result of the CPP-D decision, the recipient is a member of a prescribed class effective April 1, 2007.
- Date of grant is amended to April 1, 2007 to reflect the CPP-D retro-grant.

Example B: Ontario Works Referral: Previously granted ODSP based on the date the DDP was received.

CPP-D Application Date Dec. 14, 2006	Application Part 1 completed by Ontario Works. All required information received. Jan. 5, 2007	DAU receives completed DDP. Feb. 15, 2007	DAU determines applicant to be a person with a disability. June 10, 2007	CPP-D retro-granted effective Jan. 12, 2007. CPP-D eligibility letter dated June 25, 2007
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- The DDP was received on February 15, 2007.
- The initial date of grant was March 1, 2007 (the first day of the month following the month the application was complete).
- As a result of the CPP-D decision, the recipient is a member of a prescribed class effective January 12, 2007.
- The date of grant is amended to February 1, 2007 (the first day of the month following the month the application is complete) to reflect the CPP-D retro-grant.

Scenario 7: Applicant applies to ODSP and CPP-D and becomes eligible for disability benefits under the Canada Pension Plan for a date after the DDP was received.

In the following examples, the applicant is granted CPP-D for a date after the DAU received the completed DDP. In these cases the adjudication process will proceed, and if the person is determined to be a person with a disability, the date of grant will be based on the earlier of:

- the date the application was complete with respect to prescribed class status; and
- the date the application was complete with respect to applying as a person with a disability.

Example A: Self-referred applicant: CPP-D decision rendered for a date prior to the DAU decision, but after the DDP was received.

CPP-D Application Date	ODSP Application Part 1 complete. All required information received.	DAU receives completed DDP.	CPP-D retro-granted effective May 1, 2007. CPP-D eligibility letter dated June 1, 2007	DAU determines applicant to be a person with a disability. May 28, 2007
Jan. 1, 2007	Feb. 1, 2007	Feb. 25, 2007		

- The DDP was received on February 25, 2007.
- The applicant becomes a member of a prescribed class May 1, 2007.
- To allow for the most favourable date of grant, the applicant is granted effective the date the application was complete: February 25, 2007.

Example B: Ontario Works referral: CPP-D decision rendered for a date prior to the DAU decision, but after the DDP was received.

CPP-D Application Date	Application Part 1 completed by Ontario Works. All required information received.	DAU receives completed DDP.	CPP-D retro-granted effective April 1, 2007. CPP-D eligibility letter dated June 1, 2007	DAU determines applicant to be a person with a disability.
Dec. 20, 2006	Jan. 5, 2007	Feb. 15, 2007		May 1, 2007

- The DDP was received on February 15, 2007.
- The applicant becomes a member of a prescribed class effective April 1, 2007.
- To allow for the most favourable date of grant, the applicant is granted effective the first day of the month following the month the application is complete: March 1, 2007.

Scenario 8: ODSP decision of medical ineligibility is appealed and CPP disability benefits are subsequently granted retroactively.

In this scenario, the DAU’s decision of medical ineligibility is effectively replaced with a decision that the applicant is eligible for ODSP as a member of a prescribed class.

Example: Self-referred applicant: Appeal is pending and CPP Disability Benefits are granted retroactively.

CPP-D Application Jan. 1, 2007	Application Part 1 complete. All required information received. May 1, 2007	DAU receives completed DDP. July 1, 2007	DAU determines applicant is not a person with a disability. Appeal to SBT is pending. Oct. 1, 2007	Granted CPP-D retroactive to June 1, 2007 . CPP-D eligibility letter is dated December 1, 2007
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- The DDP was received on July 1, 2007.
- The applicant is a member of a prescribed class effective June 1, 2007.
- Therefore, the applicant is granted effective June 1, 2007.

Scenario 9: Spouse found to be a person with a disability by the DAU.

The same principals outlined in the previous scenarios are relevant when a spouse applies as a person with a disability. The spouse’s application is considered complete on the date the DAU receives their completed DDP.

In this scenario, the couple are receiving ODSP income support. The spouse applies as a person with a disability. The application is complete on the date the DAU receives the spouse’s completed DDP.

Example A: Spouse of an ODSP recipient: Spouse found to be a person with a disability by the DAU.

ODSP Application Part 1 complete for couple. All required information received. Jan. 1, 2006	Financial Eligibility Determined and DDP provided to Applicant. Jan. 20, 2006	DAU receives applicant’s completed DDP. Feb. 25, 2006	DAU determines applicant to be a person with a disability June 15, 2006	Date of grant (couple, recipient with non-disabled spouse) Feb. 25, 2006	DDP provided to the spouse. Jan. 20, 2007	DAU receives spouse’s completed DDP. Feb. 25, 2007	DAU determines spouse to be a person with a disability June 15, 2007
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The date of grant for the spouse (the date the benefit unit is eligible to receive ODSP double-disabled rate) is the date the spouse’s application was complete: February 25, 2007.

Note: In February, the difference between the income support they are eligible to receive as a double-disabled couple less the amount received as a couple, one disabled is prorated from the 25th of the month to the end of the month.

Example B: Single person applies for ODSP through Ontario Works referral requiring adjudication and subsequently marries an ODSP recipient

Application Part 1 completed by Ontario Works. All required information received. Jan. 1, 2007	Financial Eligibility Determined and DDP provided. Jan. 20, 2007	Becomes a spouse of an ODSP recipient Feb. 14, 2007	Added as spouse to ODSP benefit unit Feb. 1, 2007	DAU receives completed DDP. Feb. 25, 2007	DAU determines the spouse to be a person with a disability. June 15, 2007
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The date of grant for the spouse (the date the benefit unit is eligible to receive ODSP double-disabled rate) is the first day of the month following the date the application was complete: March 1, 2007

Scenario 10: Dependent adult found to be a person with a disability by the DAU.

In this scenario, the dependent adult receives ODSP income support or Ontario Works financial assistance as part of his/her parent’s benefit unit. The dependent adult applies as a person with a disability.

The same principals outlined in Scenario 9 are relevant when a dependent adult applies as a person with a disability. The dependent adult’s application is considered complete on the date the DAU receives his/her completed DDP.

Financial eligibility must be established before a DDP can be provided and a referral made to the DAU.

In this scenario, financial eligibility has been established by the fact that the person was included as a dependent adult in his/her parent’s ODSP or Ontario Works benefit unit.

The Application for Assistance Part 1 should have been completed in full, and signed by the applicant, spouse and any dependent adult(s) who were in the benefit unit at the time of his/her parent’s application.

Example: **Dependent adult included in the benefit unit of an ODSP or Ontario Works recipient:** Dependent adult found to be a person with a disability by the DAU.

Dependent adult receives income support/financial assistance as part of parent's benefit unit prior to Nov. 2007	DDP provided to the dependent adult Nov. 2007	DAU receives dependent adult's completed DDP April 18, 2008	DAU determines dependent adult to be a person with a disability May 6, 2008	ODSP Application Part 1 completed and signed by applicant (i.e. the dependent adult.) June 6, 2008
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The date of grant for the dependent adult receiving ODSP income support as part of his/her parent's benefit unit is the date the application was complete: April 18, 2008.

The date of grant for the dependent adult receiving Ontario Works financial assistance as part of his/her parent's benefit unit is the first day of the month following the date the application was complete: May 1, 2008.

HYPERLINKS ASSOCIATED WITH THIS POLICY DIRECTIVE

Related Directives:

[1.1 Applications](#)

[1.2 Disability Adjudication Process](#)

[1.3 Rapid Reinstatement](#)

[3.1 Consolidated Verification Information Requirements](#)

[13.2 Appeals](#)

Bulletins:

[2003-03](#)

[2006-11](#)

Transition Directives:

[2006-03](#)

[2006-07](#)