



Request for a Recoverable Advance Because of Decreased Income-Tested Tax Benefits

Privacy Notice Statement

The personal information requested in this form is collected under the authority of the *Financial Administration Act* and will be used for assessing your request in accordance with the Directive on Payments and with the Directive on Public Money and Receivables. Refusal to provide the requested information may delay or prevent the processing of your request. The personal information you provide may be shared with the Treasury Board of Canada Secretariat's Claims Office and Public Services and Procurement Canada. Your personal information will be protected, used and disclosed in accordance with the *Privacy Act* and as described in Personal Information Bank PSU 931 (Accounts Payable) and PSU 932 (Accounts Receivable). Your information may also be used or disclosed for financial reporting and program evaluation. The information will be retained for seven years following the last administrative action and then destroyed. Under the Act, individuals have rights to request access to and correction of their personal information. If you wish to avail yourself of these rights or require clarification about this Privacy Notice Statement, please contact your organization's Privacy Coordinator, whose contact information can be found at <https://www.tbs-sct.gc.ca/hgw-cgf/oversight-surveillance/atip-aijrp/coord-eng.asp>. If you are not satisfied with the response to your privacy concern, you may wish to communicate with the Office of the Privacy Commissioner by telephone at 1-800-282-1376 or by email at info@priv.gc.ca.

This form is for processing requests for recoverable advances by current and former employees who have received reduced income-tested social benefits and/or have experienced other financial hardship because of Phoenix-related pay issues. Please see Note 1 of the instructions for further information.

Section 1: Employee information

Personal record identifier (PRI)	Surname	Given name(s)
Department or institution	Branch, division or section	Email address
Address: street number and name, unit number	City, province/territory, postal code	Telephone number

Section 2: Overpayment information

Important: In order to be eligible for a recoverable advance, you must have submitted a request to the Public Service Pay Centre to record your overpayment and request amendments to your tax slips. If you have not yet done so, you may be required to register the overpayment and request amendments to your tax slips before an advance will be provided to you.

Have you: <ul style="list-style-type: none"> notified the Public Service Pay Centre that you have been overpaid and requested that your tax slips be amended? 	<input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, please provide case number:	Gross amount of overpayment: \$
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Section 3: Social benefits entitlements

Apart from your employment income, have there been any significant changes in your personal	<input type="checkbox"/> Yes
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situation that may affect your entitlements to income-tested social benefits? Examples are a change in the number of dependent children, marital status, and province or territory of residence.			<input type="checkbox"/> No
If yes, please provide additional information:			
Amount of your social benefit entitlements for the previous year:	Previous year \$	Amount of your social benefit entitlements for the current year:	Current year \$
Please attach your benefit statements for both the current and previous year. In order to protect your personal information, we encourage you to black-out your Social Insurance Number (SIN) from any tax forms or other documentation that you send us.			
Section 4: Other information (for a different situation)			
If your request for a recoverable advance is not related to an overpayment and delays in amending your tax slips, please provide the details of your situation (attach a separate page if necessary):			
Section 5: Recoverable advance request			
The maximum recoverable advance that will be issued is based on the difference between your eligible benefits for the previous year and your eligible benefits for the current year. Advances will be issued for the number of months since July of the current year plus three months. Please see Note 2 of the instructions for additional information.			Amount requested
			\$

Section 6: Attestation, certification and consent

I understand and agree that any advances provided to me through this request are **repayable**. Advances are repayable once my tax slips have been correctly amended and the Canada Revenue Agency or Revenu Québec has reassessed my income tax return and has also recalculated my social benefit entitlements. It is my responsibility to inform my home department or agency once I receive notification from the Canada Revenue Agency or Revenu Québec that my social benefits have been reassessed and recalculated.

The recovery of any advances will be done in accordance with the Treasury Board's Terms and Conditions of Employment and the Directive on Public Money and Receivables.

By signing this form, I consent to the disclosure of my personal information to the Treasury Board of Canada Secretariat's Claims Office and to Public Services and Procurement Canada.

A suspected fraudulent request may be referred to the appropriate authorities within my department or institution, including its Departmental Security Officer and/or its Chief Financial Officer, for further examination in accordance with pertinent legislation.

Date	Employee's signature	Telephone number
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Be sure to include the following with your request:

- copies of your benefit statements: current and previous years
- copies of your employment income: current and previous years (T4/RL-1 or Notice of Assessment)
- In order to protect your personal information, we encourage you to black-out your Social Insurance Number (SIN) from any tax forms or other documentation that you send us.

Instructions

1. A financial hardship would typically occur when an employee has been overpaid in the previous calendar year but the employee's tax slips (T4/RL-1) have not yet been amended to correct for the overpayment. This may result in above-normal employment income being reported for the previous year, which in turn may decrease the employee's eligibility for income-tested social benefits. There can be other scenarios in which an employee may be eligible for a recoverable advance. Details can be provided in Section 4: Other information.
2. **Scenario 1:** An employee received \$6,400 in social benefits in 2016, but in 2017 the employee received notification that their benefits in 2017 would be \$4,000. The employee applies in July for an advance of three months, so the employee will be eligible for the following:

$$\frac{\$6,400 - \$4,000}{12 \text{ months}} \times 3 \text{ months} = \$600 \text{ recoverable advance}$$

3. **Scenario 2:** This scenario is the same as Scenario 1, except that the employee makes the request for the recoverable advance in November of the current year. The employee will be eligible for the following:

$$\frac{\$6,400 - \$4,000}{12 \text{ months}} \times (3 \text{ months} + 4 \text{ months (July to November)}) = \$1,400 \text{ recoverable advance}$$