

FINANCIAL LITERACY

Determining Eligibility

Using the medical criteria worksheet in your handouts, can you determine which of the individuals would qualify for the Disability Tax Credit? Place an “X” under Yes or No.

The facilitator will take up the solution. If you made errors, make notes as to what criteria was incorrect to help in your determination and understanding of the criteria.

SCENARIOS

Case	Notes	Yes/No
Marcus is 51 years old. He suffered an injury at work and can no longer see from his left eye.	Marcus continues to work and has a prosthetic eye.	No
Evelyn is 67 and suffered a stroke in 2015. Since then her speech has been slowing down and she is no longer able to speak without aid.	Evelyn communicates using sign language the majority of the time with an iPad.	Yes
Martin is 71 and noticed over the years his hearing has been declining. He can hear, only very faintly.	Martin has a hearing aid; he wears it 75% of the time.	No
Joanne is no longer able to walk on her own aside from a few short steps.	Joanna is dependent upon a wheel-chair for mobility.	Yes
Tom had bladder cancer and is now in remission. As a result of his surgery he is no longer able to control his bladder/bowel functions.	Tom wears an ostomy “bag” to facilitate his bladder/bowel function.	Yes
Robert has struggled all his life with mental health issues. He no longer is able to be alone as he has no control over his reactions to his environment.	Robert is supported by his mother full time as he is unaware of where he is or what he is doing the majority of the time.	Yes
Josie was in a car accident at the age of 18. She suffered a serious brain injury. She spends the majority of her day bed-ridden.	Josie is not mobile and is fed using a feeding tube.	Yes

Notes

1. Marcus does not qualify as his vision impairment does not stop him from continuing with daily life. Also, to be considered an impairment, both eyes must be affected.
2. Evelyn qualifies as she is unable to speak anymore except with assistance of sign language or a device.
3. Martin does not qualify as he can hear faintly, does not use sign language or lip reading and only wears his aid 75% of the time.
4. Joanne qualifies as she is no longer mobile and depends on her wheelchair.
5. Tom qualifies as he cannot facilitate his own bladder/bowel movements and uses a bag.
6. Robert qualifies as having a mental restriction as he is unable to take care of himself and has limited adaptive function.