



REV-573 08-20

PROPERTY TAX/RENT REBATE PROGRAM



The Property Tax/Rent Rebate program benefits eligible Pennsylvanians age 65 and older; widows and widowers age 50 and older; and people with disabilities age 18 and older. The income limit is \$35,000 a year for homeowners and \$15,000 annually for renters. Claimants may exclude half of their Social Security income.

In addition, federal Civil Service Retirement System benefit recipients may exclude 50% of the average annual Social Security benefit amount from their total eligibility income and veterans with federal veterans' disability payments or state veterans' payments may exclude 100% of those payments. The maximum standard rebate is \$650, but supplemental rebates for qualifying homeowners can boost rebates to \$975.



For more information about the Property Tax/Rent Rebate Program, please visit revenue.pa.gov/PTRR.

Who can file for a Property Tax/Rent Rebate?

Property Tax/Rent Rebates are based on property taxes or rent paid the previous calendar year.

AGE

- ✓ You or your spouse must have been at least 65 years old as of Dec. 31 of the claim year; or
- ✓ You were a widow or widower during all or part of the claim year and must have been 50 years or older as of Dec. 31; or
- ✓ You were permanently disabled during all or part of the claim year, 18 years or older during the claim year and were unable to work because of a medically determined physical or mental disability. If you applied for Social Security Disability and were denied benefits, you are not eligible for a rebate as a disabled claimant.

OWN or RENT

You must have owned and occupied a home or rented and occupied a home, apartment, nursing home, boarding home or similar residence in Pennsylvania during the period for which you claim the rebate.

Homeowners must have paid property taxes prior to applying. Renters must verify their landlords were required to pay property taxes or made payments in lieu of property taxes on rental properties.

INCOME

	INCOME	MAX. REBATE
HOMEOWNERS 	\$0 to \$8,000	\$650
	\$8,001 to \$15,000	\$500
	\$15,001 to \$18,000	\$300
	\$18,001 to \$35,000	\$250
RENTERS 	INCOME	MAX. REBATE
	\$0 to \$8,000	\$650
	\$8,001 to \$15,000	\$500

Remember to exclude one-half of Social Security benefits, Supplemental Security Income and/or Tier 1 Railroad Retirement benefits when calculating total household eligibility income. 🏠

When is the deadline to apply?

Applications must be postmarked by June 30. The PA-1000 booklet, used to apply for rebates, is available in late February at www.revenue.pa.gov or by calling, toll-free, 1-888-222-9190. Once you qualify for your first rebate, the department will automatically send you an application the next year unless you prepared and filed your claim using computer software. If you used software for a rent rebate, the department will send you a copy of the rent certificated for the next year to complete and provide with your software completed claim form. Rebate checks are mailed beginning July 1 each year. 🏠



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Can I file a claim for someone who has recently died?

Beginning with claim year 2013, property tax and rent rebate claims may now be filed on behalf of claimants who die during a claim year by surviving spouses, personal representatives or estates. See the PA-1000 booklet for additional information. 📄

What documents can I use as proof of age?

The department will accept copies of birth certificates; Blue Cross 65 Special Cards; church baptismal records; hospital birth records; driver's licenses or PA Identification Cards; naturalization papers (if age is shown); military discharge papers (if age is shown); Medicare cards; PACE/PACENET cards; and passports. Please do not submit original documents. 📄

What documents can I use as proof of income?

The department will accept as proof of income copies of federal or state income tax returns (including schedules) for the claim year and/or copies of forms 1099-INT, 1099-DIV, 1099-R, W-2 or any document providing the source and type of income as may be necessary. If the address you provided the Social Security Administration was a PA address, you do not need to submit proof of your Social Security retirement and Supplemental Security benefits. 📄

What do I need to include with my form to claim a Property Tax/Rent Rebate?

HOMEOWNERS

You need to provide proof the taxes were paid for the year claimed. If you cannot provide a receipted copy of your property tax bill, the department will accept a copy of the tax bill, along with a copy of both sides of the cancelled check used to pay your taxes.

If your name does not appear on the tax bills, proof of ownership must be submitted. Examples include a copy of the deed, trust, will or decree of distribution. If the address is not on the receipted bill or mortgage statement, you must also submit a letter from your tax collector or mortgage company verifying your home address.

RENTERS

If you are claiming a rent rebate, you must provide proof of the rent you paid. You will need a PA rent certificate for each place in which you resided during the claim year, signed by the landlord or the landlord's authorized agent.

If a landlord's signature cannot be obtained, you must complete and submit a notarized Rental Occupancy Affidavit.

If you are not able to provide a rent certificate or notarized statement, you may submit rent receipts. The landlord or his/her authorized agent must sign each rent receipt showing your name and rented address, the amount of the rent you paid and the time period for which the rent was paid. You must submit receipts for all months you claim. Please do not submit rent receipts if submitting rent certificates or notarized statements.



SUPPLEMENTAL PROPERTY TAX REBATES

Now that slots gaming is funding statewide general property tax relief for all Pennsylvania homeowners, supplemental property tax rebates are available to homeowners through the Property Tax/Rent Rebate program. These supplemental rebates are automatically calculated by Revenue and are awarded to qualifying low-income seniors who live in Philadelphia, Scranton, Pittsburgh and other parts of the state with particularly high tax burdens. Supplemental rebates may increase base rebates up to \$975.

PROPERTY TAX/RENT REBATE INFO
1-888-222-9190

ONLINE CUSTOMER SERVICE CENTER
revenue.pa.gov

If you qualify for PTRR, you may also be eligible for the PACE/PACENET low-cost prescription drug program.

Toll-Free 1-800-225-7223



I Check your label for accuracy. If incorrect, do not use the label. Complete Section I.

Your Social Security Number Spouse's Social Security Number

PLEASE WRITE IN YOUR SOCIAL SECURITY NUMBER(S) ABOVE

Last Name First Name MI

First Line of Address

Second Line of Address

City or Post Office State ZIP Code *CODES REQUIRED

Spouse's First Name MI County Code School District Code Country Code

Claimant's Birthdate Spouse's Birthdate Daytime Telephone Number

If Spouse is Deceased, fill in the oval.

II Fill in only one oval in each section.

1. I am filing for a rebate as a:

P. Property Owner – See instructions

R. Renter – See instructions

B. Owner/Renter – See instructions

2. I Certify that as of Dec. 31, 2020, I am (a):

A. Claimant age 65 or older

B. Claimant under age 65, with a spouse age 65 or older who resided in the same household

C. Widow or widower, age 50 to 64

D. Permanently disabled and age 18 to 64

3.

Filing on behalf of a decedent

III TOTAL INCOME received by you and your spouse during 2020

	Dollars	Cents
4. Social Security, SSI and SSP Income (Total benefits \$ _____ divided by 2)	4.	
5. Railroad Retirement Tier 1 Benefits (Total benefits \$ _____ divided by 2)	5.	
6. Total Benefits from Pension, Annuity, IRA Distributions and Railroad Retirement Tier 2 (Do not include federal veterans' disability payments or state veterans' payments.)	6.	
7. Interest and Dividend Income	7.	
8. Gain or Loss on the Sale or Exchange of Property. If a loss, fill in this oval.	8.	
9. Net Rental Income or Loss If a loss, fill in this oval.	9.	
10. Net Business Income or Loss If a loss, fill in this oval.	10.	
Other Income.		
11a. Salaries, wages, bonuses, commissions, and estate and trust income.	11a.	
11b. Gambling and Lottery winnings, including PA Lottery winnings, prize winnings and the value of other prizes	11b.	
11c. Value of inheritances, alimony and spousal support.	11c.	
11d. Cash public assistance/relief. Unemployment compensation and workers' compensation, except Section 306(c) benefits.	11d.	
11e. Gross amount of loss of time insurance benefits and disability insurance benefits, and life insurance benefits, except the first \$5,000 of total death benefit payments.	11e.	
11f. Gifts of cash or property totaling more than \$300, except gifts between members of a household.	11f.	
11g. Miscellaneous income and annualized income amount.	11g.	
12. Claimants with Federal Civil Service Retirement System Benefits enter \$9,514 or \$19,028. See the instructions.	12.	
13. TOTAL INCOME. Add only the positive income amounts from Lines 4 through 11g and subtract the amount on Line 12. See Page 3 for income limitations. Enter this amount on Line 23.	13.	

IMPORTANT: You must submit proof of the income you reported – See the instructions on Pages 7 to 9.



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Your Social Security Number

[Empty box for Social Security Number]

Your Name: _____

PROPERTY OWNERS ONLY

- 14. Total 2020 property tax. Submit copies of receipted tax bills. 14. [Empty box]
- 15. Property Tax Rebate. Enter the maximum standard rebate amount from Table A for your income level here: () | Compare this amount to line 14 and enter the lesser amount to the right. 15. [Empty box]

RENTERS ONLY

- 16. Total 2020 rent paid. Submit PA Rent Certificate and/or rent receipts 16. [Empty box]
- 17. Multiply Line 16 by 20 percent (0.20) 17. [Empty box]
- 18. Rent Rebate. Enter the maximum rebate amount from Table B for your income level here: () | Compare this amount to line 17 and enter the lesser amount to the right. 18. [Empty box]

OWNER - RENTER ONLY

- 19. Property Tax/Rent Rebate. Enter the maximum rebate amount from Table A for your income level here: () | Compare this amount to the sum of Lines 15 and 18 and enter the lesser amount to the right. 19. [Empty box]

DIRECT DEPOSIT. Banking rules do not permit direct deposits to bank accounts outside the U.S. If your bank account is outside the U.S., do not complete the direct deposit Lines 20, 21 and 22. The department will mail you a paper check. If your rebate will be going to a bank account within the U.S., you have the option to have your rebate directly deposited. If you want the department to directly deposit your rebate into your checking or savings account, complete Lines 20, 21 and 22.

- 20. Place an X in one box to authorize the Department of Revenue to directly deposit your rebate into your: 20.

Checking	<input type="checkbox"/>
Savings	<input type="checkbox"/>

- 21. Routing number. Enter in boxes to the right. 21. [Empty box]

- 22. Account number. Enter in boxes to the right. 22. [Empty box]

23. [Empty box] Enter the amount from Line 13 of the claim form on this line and circle the corresponding Maximum Rebate amount for your income level. Owners use Table A and Renters use Table B.	TABLE A - OWNERS ONLY		TABLE B - RENTERS ONLY	
	INCOME LEVEL	Maximum Standard Rebate	INCOME LEVEL	Maximum Rebate
	\$ 0 to \$ 8,000	\$650	\$ 0 to \$ 8,000	\$650
	\$ 8,001 to \$15,000	\$500	\$ 8,001 to \$15,000	\$500
	\$15,001 to \$18,000	\$300		
	\$18,001 to \$35,000	\$250		

IV An excessive claim with intent to defraud is a misdemeanor punishable by a maximum fine of \$1,000, and/or imprisonment for up to one year upon conviction. The claimant is also subject to a penalty of 25 percent of the entire amount claimed.

CLAIMANT OATH: I declare that this claim is true, correct and complete to the best of my knowledge and belief, and this is the only claim filed by members of my household. I authorize the PA Department of Revenue access to my federal and state Personal Income Tax records, my PACE records, my Social Security Administration records and/or my Department of Human Services records. This access is for verifying the truth, correctness and completeness of the information reported in this claim.

Claimant's Signature	Date	Witnesses' Signatures: If the claimant cannot sign, but only makes a mark.		
		1.		
Spouse's Signature	Date	2.		
PREPARER: I declare that I prepared this return, and that it is to the best of my knowledge and belief, true, correct and complete.		Name of claimant's power of attorney or nearest relative. Please print.		
Preparer's Signature, if other than the claimant	Date	Telephone number of claimant's power of attorney or nearest relative. ()		
Preparer's Name. Please print.		Home address of claimant's power of attorney or nearest relative. Please print.		
Preparer's telephone number ()	City or Post Office	State	ZIP Code	

Claim filing deadline - June 30, 2021
You can call 1-888-728-2937 after June 1 to verify the status of your claim.

