

Property Tax/Rent Rebate Filing Checklist

Update: Line 12 is now for the exclusion of up to 50% of the average Social Security benefit amount for federal civil service employees receiving benefit payments from the Civil Service Retirement System which pushes Total Income to Line 13.

Note: If you were a renter that received cash public assistance for the entire year, you are not eligible for a rebate.

First Time Filer:

Were you or your spouse 65 years or older on December 31 of the claim year?	Y	N
<input type="checkbox"/> If yes, you must submit proof of age (see table below for acceptable proof of age)		
Were you a widow/widower and 50-64 years old by December 31 of the claim year?	Y	N
<input type="checkbox"/> If yes, you must submit proof of age (see table below for acceptable proof of age)		
<input type="checkbox"/> If yes, you must submit a copy of your spouse's death certificate		
Were you permanently disabled and 18-64 years old by December 31 of the claim year?	Y	N
<input type="checkbox"/> If yes, you must submit proof of age (see table below for acceptable proof of age)		
<input type="checkbox"/> If yes, you must submit proof of permanent disability (see table below for acceptable proof of age)		
*If you were denied Social Security disability, you do not qualify under the permanently disabled category		

NOTE : If you selected "No" for all three of the above questions, you are not eligible for a rebate

Acceptable Proof of Age:	Acceptable Proof of Permanent Disability:
<ul style="list-style-type: none"> Birth Certificate Blue Cross or Blue Shield 65 Special Card Church Baptismal Record Driver's License of PA Identification Card Hospital Birth Record Naturalization/Immigration Paper (if age shown) Military Discharge Paper (if age shown) Medicare Card PACE/PACENET Card Passport 	<ul style="list-style-type: none"> For Social Security disability, SSI permanent and total disability, Railroad Retirement permanent and total disability, or Black Lung disability, provide a copy of your award letter For Veterans Administration disability, provide a letter from the Veterans Administration stating that you are 100 percent disabled For Federal Civil Service disability, provide a letter from Civil Service stating that you are 100 percent disabled If you do not qualify under any of the disability programs mentioned above, did not apply for Social Security benefits, or do not have a letter from the Veterans Administration or Civil Service Administration, you must submit a Physician's Statement of Permanent Disability (PA-1000 PS), enclosed in the PA-1000 booklet. The form must describe your disability as permanent and your physician must sign the statement to certify that the information is true and accurate to the best of his/her knowledge and belief.

Type of Filer:

Were you a homeowner the entire claim year?	Y	N
If yes, you must submit proof of tax paid (see pages 9-10 of the PA-1000 instruction book for acceptable proof of tax paid)		
Were you a renter the entire claim year?	Y	N
If yes, you must submit proof of rent paid (see pages 9-10 of the PA-1000 instruction book for acceptable proof of rent paid)		
Were you an owner/renter during the claim year?	Y	N
If yes, you must submit proof of tax paid (see pages 9-10 of the PA-1000 instruction book for acceptable proof of tax paid)		
If yes, you must submit proof of rent paid (see pages 9-10 of the PA-1000 instruction book for acceptable proof of rent paid)		

NOTE: If you selected "No" for all three of the previous questions, you are not eligible for a rebate.

Property Tax/Rent Rebate Filing Checklist

For your convenience, the following questions pertaining to income are organized in the order that the income should be reported on the PA-1000 claim form.

Income :

Did you receive Social Security, SSI, and/or SSP during the claim year?	Y	N
<input type="checkbox"/> If yes and you are using a PA address, you are not required to submit proof of this income <input type="checkbox"/> If yes and you are not using a PA address, you must submit a copy of your SSA-1099		
Did you receive Railroad Retirement Tier 1 Benefits during the claim year?	Y	N
<input type="checkbox"/> If yes, you must submit a copy of your RRB-1099		
Did you receive a Pension, an Annuity, or an IRA Distribution during the claim year?	Y	N
<input type="checkbox"/> If yes, you must submit a copy of your 1099-R		
Did you receive Railroad Retirement Tier 2 benefits during the claim year?	Y	N
<input type="checkbox"/> If yes, you must submit a copy of your RRB-1099-R		
Did you receive Interest income during the claim year?	Y	N
<input type="checkbox"/> If yes, you must submit a copy of your 1099-INT or a copy of your PA-40		
Did you receive dividend income during the claim year?	Y	N
<input type="checkbox"/> If yes, you must submit a copy of your 1099-DIV or a copy of your PA-40		
Did you have a Gain or Loss on the Sale or Exchange of Property during the claim year?	Y	N
<input type="checkbox"/> If yes, you must submit a copy of your PA-40 Schedule D or a copy of your RK-1		
Did you have Income (or a Loss) from Rent, Royalty, Patents, or Copyrights during the claim year?	Y	N
<input type="checkbox"/> If yes, you must submit a copy of your PA-40 Schedule E or a copy of your RK-1		
Did you have Income (or a Loss) from Business or Farming during the claim year?	Y	N
<input type="checkbox"/> If yes, you must submit a copy of your PA-40 Schedule C, PA-40 Schedule F, or a copy of your RK-1		
Did you receive wages, salaries, bonuses, and/or commissions during the claim year?	Y	N
<input type="checkbox"/> If yes, you must submit a copy of your W-2 or a copy of your PA-40		
Did you receive income from an Estate or Trust during the claim year?	Y	N
<input type="checkbox"/> If yes, you must submit a copy of your RK-1 or a copy of your PA-40		
Did you receive Gambling/Lottery winnings (including PA Lottery winnings, prize winnings, and the value of other prizes) during the claim year?	Y	N
<input type="checkbox"/> If yes, you must submit a copy of your W-2G, Win/Loss statement, PA-40 or other statements verifying the income/cash value of the income received		
Did you receive an inheritance, alimony, and/or spousal support during the claim year?	Y	N
<input type="checkbox"/> If yes, you must submit proof of the income received		
Did you receive cash public assistance during the entire claim year?	Y	N
<input type="checkbox"/> If yes, you are not eligible to claim a rebate		
Did you receive cash public assistance during part of the claim year?	Y	N
<input type="checkbox"/> If yes, you must submit copies of your Department of Human Services cash assistance statements		
Did you receive unemployment compensation during the claim year?	Y	N
<input type="checkbox"/> If yes, you must submit a copy of your UC-1099-G		
Did you receive workers' compensation during the claim year?	Y	N
<input type="checkbox"/> If yes, you must submit proof of the income received		
Did you receive loss of time insurance benefits, disability insurance benefits, and/or life insurance benefits during the claim year? (may exclude the first \$5,000 of death benefit payments)	Y	N
<input type="checkbox"/> If yes, you must submit proof of the income received		
Did you receive benefit payments from the Federal Civil Service Retirement System that are included in your eligibility income?	Y	N
<input type="checkbox"/> If yes, you must submit a copy of your 1099-R and you should report the amount listed in the PA-1000 instruction booklet.		