

Conference Title: The Rent Rebate Program

Moderator: Teresa McDonnell

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Teresa McDonnell: Good morning, everyone. My name is Teresa McDonnell. I am the Outreach Operations Manager with the Pennsylvania Enrollment Assistance Program. Welcome to the Pennsylvania Enrollment Services Webinar series.

To kick off our 2019 Webinar series, we have our first Webinar, Pennsylvania's Property Tax Rent Rebate Program. Thank you for attending this morning. Before we begin, please know that the phones have been muted. If you have any questions, please type them directly into the chat box at the bottom right of your screen and we'll answer them at the end of the presentation.

This call is being recorded. The slides and other related materials will be posted on www.enrollnow.net and the slides will also be available after the Webinar for download.

Now let's get started with the Webinar. Our presenter today is Chantel Hardaway. Chantel began her career with the Commonwealth in 2008 with the Department of Revenue in human resources, where she worked in the training and development.

In November of 2017, she joined the Customer Experience Center as the Chief of Outreach and Education, where she worked to build relationships with outside organizations and increase outreach and education initiatives on behalf of the Department of Revenue. This includes coordinating webinars, educational video content, as well as in-person presentations.

We are very happy she could join us today to educate us on this program. I will now turn it over to you, Chantel, to educate us on Pennsylvania's Property Tax Rent Rebate Program.

Chantel Hardaway: Thank you, Teresa. Good morning, everyone, and thank you for joining us today on our Webinar to talk about the Property Tax Rent Rebate Program. Today we'll just cover a very brief overview of the history of the program. We're going to talk about the eligibility requirements and some important dates.

We'll spend a majority of our time on this Webinar walking through the PA-1000 form as well as giving you some information and some tips on how to fill out each of those sections and just some general tips overall on the program and on the form. And then very briefly at the very end we'll let you know some resources should you have any further questions after this.

So a brief overview of the history of the program. The Property Tax Rent Rebate Program did begin in 1971 under Act 3 of 1971. The purpose of the program is to provide rebates to qualifying older Pennsylvanians and those with disabilities for their property tax or rent paid. The rebates are wholly funded by the PA state lottery. Pennsylvania is actually the only state lottery to fund a program like this through their funding so it's no taxpayer dollars.

There is a supplemental property tax rebate and we'll talk about that in just a few minutes and that is funded by slots gaming. Since the inception of the program, the Department has paid out more than \$6.7 billion. So we are definitely proud of that and we want to continue to increase participation in these programs.

So let's talk about the eligibility requirements. The program is geared for Pennsylvanians aged 65 or older. You can also qualify if you are under age 65 with a spouse... (technical audio difficulties)

Teresa McDonnell: Chantel, can you still hear me? Can everyone still hear me? (Mary Ellen), thank you.

Chantel Hardaway: (technical audio difficulties corrected) \$5,000. We'll talk about what those categories mean just a little bit more as well as what the income qualifications are.

So in terms of rebates, the maximum rebate amount for property owners is \$650 as the standard rebate. The maximum rebate for renters is \$450 - I'm sorry, \$650, depending on income thresholds.

Teresa McDonnell: Hey, Chantel?

Chantel Hardaway: Yes.

Teresa McDonnell: I apologize to interrupt. Can we go back one slide? And can I have you do that again. Apparently, we had a line disruption so we were unable to hear. Thank you.

Chantel Hardaway: You are very welcome. Okay. So in terms of eligibility requirements, as I mentioned before, the program is geared towards older Pennsylvanians or those with disabilities. And so who is eligible are Pennsylvanians aged 65 or older, Pennsylvanians under the age of 65 with a spouse who is at least 65 years or older, if someone is a widow or widower age 50 or older or if it's an individual with a disability age 18 and older.

And to qualify for the program, the claimant must be a property owner with income less than \$35,000 or a renter with income less than \$50,000 or a property owner and a renter in the same year with income less than \$35,000. And we'll talk more about what income means and what we consider income and how we look at income as we start going through the form a little more. Okay?

And then these are the maximum rebate amounts. So as I mentioned, the maximum rebate amount for a property owner is \$650 as well as for a renter. For a property owner there is also a supplemental rebate.

The supplemental rebate is really for those that live in higher property tax areas. So it talks about - on the slide you see it talks about owners and the Pittsburgh School District, in the Philadelphia

area or in the Scranton areas or those that have property taxes that are equal to or more than 15% of their total income.

For a claimant's purpose the claimant does not need to calculate this. When the forms come into the Department of Revenue, we will calculate if there is any supplemental rebate due on top of whatever standard rebate is owed to the claimant. So we will calculate that internally.

Some important dates with the program. So typically around the end of January, the forms become available for this year. It was January 23rd that the forms became available to be able to be downloaded and filled out.

Typically in April, the Department of Revenue will start making automatic calls. So on the claim form is a spot to fill out a claimant's phone number where they can be reached during the day. And we will make automatic calls just letting claimants know that their claims were received.

In June we again make automatic calls again for those that have provided us their phone numbers to let them know if their rebate was approved and that direct deposit will begin on 7/1 of each claim year. And so the reason for that is actually we are not allowed to make payments by law until July 1st.

Now also in June the Governor may decide to extend the deadline. Typically in the last few years the Governor has always extended the deadline to December 31st but we want to make sure that claimants get their claim in on time so we suggest making sure that claimant's meet that standard deadline of June 30th.

All right. So now let's talk about the PA-1000 in a little bit of detail. So the PA-1000 has actually two pages to it. On the first page we'll start with Section A. So the very first thing that needs to be

listed is the primary's Social Security number in full. Sometimes we see people who may just put the last four of their Social Security number, but we need the full Social Security number.

If the claimant is married, we also need the spouse's Social Security number listed on the form as well. And then we'll need the claimant's name and address as well as the county code that they lived in and the school district code that they lived in. These two codes are actually in our instruction booklet. So if you don't know the county code or the school code, it's not a problem. It's in the instruction booklet along with the forms.

We also need the claimant's and the spouse's birthdates as well as, as I talked about before, that daytime telephone number. And that really is so that we can send those automatic calls out for you. So we ask that you make sure it's a good phone number to reach the claimant at. In Section B, we're looking for the claim status. So the first oval is really that filing status. So, like I talked about before, whether the person is a property owner, a renter or an owner/renter.

Some of the reasons a person may be an owner/renter is, for instance, if they own a mobile home but they rent the land that the home is on. That might be a reason that a claimant is an owner/renter. It may also be that during the claim year the person may have sold their home and then moved to a rental property. So those may be some reasons why someone would select owner/renter as opposed to either property owner or just straight renter.

We also then ask for the person to fill out what they're claiming based on so whether it's age, a spouse's age, widow or widower status or whether it's a disability status that they're claiming. And then for Number 3, that is if the claimant is deceased. A claim can be filed on behalf of someone who is deceased. However, if the spouse is eligible to claim on their own, we actually do advise that the spouse claims on their own as opposed to filing under the deceased claimant.

So that typically happens when someone has been filing for a property tax rent rebate claim and then passes away is typically when they would do that. So for a first-time filer, there are some things that the Department of Revenue needs. And if we don't have those, it will slow up processing for the claim. So for first-time filers, depending on the status that they're claiming we do need proof.

So if they're filing saying that they're 65 or older, we'll need proof of age. If they're filing saying that they are less than 65 but their spouse is 65 or older, we will need proof of age of the spouse. If they are filing as a widow or widower, we will need proof of age as well as a copy of the death certificate.

And I do stress copy. We do not send any documentation back and so it's really important that we don't get originals of anything. We do need copies of death certificates and things like that. If they're filing based on a disability for age 18 or older we do need proof of age and disability for that claim then. So those are the proof documents for first-time filers.

So Section C, we're going to go through this line-by-line because I know that's really hard to read on that slide. But in general I just wanted to say for Section C for this particular form, if there are no amounts to report, please leave that blank.

The way our scanning system works it will pick up if there is a mark in there and it will just make it harder - it will just take it a little bit more time for your claim to get processed if you're submitting a claim because someone will have to hand look at that and make sure that the system didn't actually only pick up on a mark and try to interpret it as a number. So if for this particular form if there is no amount to report please leave that blank.

So on Line 4 the claimant would report their Social Security income. And for purposes of Social Security we actually have that income. So where it says total benefits and it has the number sign the total amount would be reported there, but on actual Line 4 it would be half of that amount. The

proof documentation for that would be the Form SF-8 1099, this would be the proof statement for that.

For Line 5, that's the railroad retirement Tier 1 benefit. Tier 1 benefits are considered to be equivalent to Social Security benefits. So, again, we also half that. So, again, the claimant, if they have this, if they were receiving these benefits, would report the total amount where it says total benefit, take half of it, and on Line 5 report half of that amount.

So then Line 6 is for any sort of pension, annuity, IRA distributions or railroad Tier 2 benefits. These are not halved. So they are reported in whole. Tier 1 benefits and Tier 2 benefits are treated a little bit differently. Tier 2 railroad retirement benefits are treated more like a private pension and so because of that we do not half that amount.

So these are some of the proof documents that you might use, so 1099 interest forms, the RRB-1099. Those might be some forms that you would use if you were reporting income on this particular line. For Line 7 it would be reported for interest and dividend income. So the claimant will report any interest or dividend income that they receive or that's been credited to them during the year, whether they actually receive the cash or not.

So the proof documents would be 1099 Interest, 1099-DIV. It could also be a copy of the 1040, Schedule B, for the federal form or the PA-40, Schedule A and B. So Line 8, this is where we start reporting any losses to Lines 8, 9 and 10. This is potentially if you have any gains or losses that you would report. Line 8 is specifically for a gain or loss for any sale or exchange of property.

It's important to note that you can only offset a gain with a loss from the same category, meaning if it's property and let's say you sold two different properties and you had a gain on one and a loss on the other, you could offset that. However, if it's selling an actual property versus a loss from,

like, a rental those are not reported on the same - rental income, those aren't reported on the same lines so you couldn't offset it together.

You also can't offset any loss from someone else. Meaning that if you have a gain and your spouse has a loss, it's whoever the primary claimant is, is how you would report that. Line 9 is for any gain or loss on net rental income or any loss on that. And Line 10 is for any net business income or any business income loss. And, again, you would put that amount on there. You would also want to fill in that loss bubble if it is a loss. So you're going to put the amounts. Don't put a negative. Just make sure you fill in the loss circle if it is a loss.

So next, let's start looking at Line 11. So 11A, we're going to start reporting any other income. So that would be salaries, wages, estate or trust income or anything like that. So that would be from things like your W2s, 1099 documentation or anything like that where you have salaries, wages, bonuses, commissions, any of that type of income that is listed on there.

Line 11B is for any gambling and lottery winnings, including PA lottery winnings, prize winnings or the value of those prizes. So, you know, sometimes people win a prize instead of actual cash. That still has a cash value so that would need to be reported. The proof documents for that would be the PA-40, Schedule T, or the W2-G if it's a win or loss statement from a casino.

Lines 11C through G, this is, again, for reporting some additional income. So Line 11C is used for any inheritance, alimony or spousal support. The proof documents for this would be a copy of the court order or support agreement or inheritance return.

One thing to note is that child support is never reported since the income is technically for the child even if the claimant is getting those payments. And so it is not reportable for property tax or rebate purposes.

Line 11B is used for any cash public assistance, unemployment benefits or workers' compensation. If the claimant does receive any sort of cash public assistance, the proof documents would be a statement from the Department of Human Services. If the claimant was a renter and received that for the entire year, they would not be eligible for the rebate. They would also need to complete a PA-1000, Schedule B, if they're filing as a renter. And we'll talk about Schedule B a little bit later.

Unemployment proof documents would be the UC-1099G. Unemployment compensation is handled by the Department of Labor and Industry. So if you have any questions about that specifically in terms of unemployment compensation you can talk to them. But in general for the proof documents for us it would be that UC-1099G statement.

Line 11E is used for any loss of time, disability and life insurance benefits. So the claimant would not include the first \$5,000 of any total death benefit payment but anything after that would be reported on that line. And there are various proof documents that would be needed for that. So if you or someone that you know has any income that needs to be reported on that line and you're not sure what to send in, please, by all means, give us a call and we can talk through that depending on what the situation is.

For Line 11F, that's used for any gifts of cash or property that's more than \$300. It doesn't include any sort of gifts from household members or anything like that. But typically the proof documents would be a letter of explanation describing what was received. And, again, we're not talking about gifts between family members.

Line 11G is used for any other income that didn't get reported anywhere else. So if for reason you have any sort of other miscellaneous income that doesn't fit in any of those categories that would be where that is reported. And, again, if you have any questions while you're filling out the form about - if you have a specific income and you're not sure where to report it, you can absolutely give us a call.

Line 12 is actually new for this year. If the claimant is receiving civil service retirement system benefits, sometimes they're called CSRS, they would report that on Line 6. And they would also then be eligible for a standard deduction of \$8,231. It's important to note that if a claimant and a spouse are both receiving these benefits then they would double that deduction to \$16,462.

Line 13 is where that total income is added up, so that's Lines 4 through 11G. If there is that deduction on Line 12 that would get subtracted from that amount and then the total income would go on Line 13. It also gets reported on Line 23 on the form as well. So this is starting the second page of the form. One thing I want to note that it is really important that you put the primary claimant's Social Security number on top of the form as well as the name of the primary claimant.

If the person is a property owner, they are then going to fill out 14 and 15. So Line 14 is used for the property owner to report the amount of property taxes paid for the claim year. Line 15 is used for comparing the standard rebate amounts, the amount of the property taxes paid. If the person is not a property owner then you would just leave those blank.

Some of the proof documents that would be used for that would be copies of the receipted tax bill. What that means for our purposes is that it has been stamped and paid by the tax collector. It has the date paid on there and the amount paid. So that's what we consider the proof document for taxes being paid for that claim year.

And I keep mentioning claim year. When I talk about claim year, it's just like with taxes. I'm talking about the previous year. So it's 2019 right now. The claim year for this cycle's property tax rebate would be 2018. So that's what I mean when I keep saying the claim year.

For a renter, the renter would fill out Lines 16 through 18. So they would fill out on Line 16 the total rent paid for the claim year. They would also need to submit a rent certificate. And we'll talk about

the rent certificate in just a little bit. Then what they're going to do is they're going to take that rent amount and they're actually going to multiply it by 20% and put that on Line 17. And then there is a table in the form that based on that amount we'll show you what the maximum rebate amount you would be eligible for. And that's for both the property owners as well as renters.

And then line 18 is used for comparing what that standard rebate amount is from Table B to the amount from Line 17, which is that 20% of the rent. So proof documents for renters, like I said, the rent certificate, or the PA-1000 RC, and, again, we'll look at that form in just a little bit in this presentation. You can provide copies of the rent receipts signed by the landlord or the authorized agent for your rental unit for each month the claimant is claiming a rebate for.

If you have the rent certificate, we don't also need copies of the rent receipts. If you only have copies of the rent receipts, you can also fill out the rent certificate along with it. But then there's an oath of affidavit that would be signed. And, again, we'll talk through that form and what those sections are.

You can also get a statement from a housing authority if you can't get the rent certificate filled out. And again, you can also just include that rent certificate and the oath of affidavit signed at the bottom of that certificate. So for an owner/renter, if a person was both an owner and a renter for the claim year, they actually have to fill out both of those sections for a property owner as well as for a renter.

And so based on those, we would then use Table A for the income and then Line 19 is used to compare the amount to the sum of Lines 15 and 18. So, again, an owner and a renter together in the same claim year would have to fill out both the property owner portion as well as the renter portion.

Lines 20 through 22 are for direct deposit. We encourage folks to use direct deposit. It is the fastest way to get the rebate. And so it is important then if you're using direct deposit to let us know if it's a checking or a savings account, the routing number as well as the account number.

So as I talked about before when I talked about Line 13, that was the total income. It goes on Line 13 as well as Line 23. And when I talked about before Table 8 for property owners or Table B for renters, this is where those tables are. And, again, it just shows you based on your income what the maximum standard rebate would be. And that, again, is income as the Department defined it for the purposes of the Property Tax Rent Rebate Program.

And then in Section D of the form, this is really important. The form has to be signed. So Section D must be filled out before it can be submitted. If for some reason the claimant cannot sign the form, so if a disability is so severe that the claimant can't write their name, what they would do is they would make a mark in the claimant's signature area and then two witnesses would sign the form saying that that was the claimant's mark.

If for some reason you had a preparer doing this return, they would report filling out the form for you then they would be the ones that would be that affidavit of preparer. So, again, make sure that the form is signed before it gets submitted.

So let's talk about some other important additional documents that you may need while you're filling out the form or when you submit your form to the Department of Revenue. And so the first thing we'll talk about, like I said, is the rent certificate. The rent certificate needs to be filled out in full and it needs to be filled out for each rental property. So for instance if a claimant rented somewhere maybe in the first four months of the claim year and then moved and rented a different unit for the remainder of the claim year, two rent certificates would need to be filled out, one for each of those units. So that's really important.

Typically we say the landlord can fill this out but the landlord definitely needs to at least sign the form. So the first part of this is making sure that the claimant's name and full Social Security number are also on this form, the address of the rental property, the owner or landlord's mortgage information so the landlord's name, address, telephone number. If they have an EIN, they would need to fill that out as well. So, again, the landlord would know all of this, if they have an EIN or not, and then fill that portion out on the form.

For Lines 4 through 8, they have to all be filled out. So unlike the PA-1000 that I talked about a few minutes ago where if you did not have an amount to enter you would just leave it blank. With this particular form, everything has to be filled out from four through eight. And so Line 4 is used to report the amount of rent paid per month so it's not the total amount. It's by month. Line 5 is used to report any amount of rent that was paid or subsidized by a government agency.

Then Line 6 is used to report the total monthly rent paid minus any government subsidy. So if there were none then there would be no deduction. You would just write the full amount in.

Line 7 is used to report the number of months that the claimant lived in the unit. So again, like I talked about before, it may be a situation where someone moved. In that case, they would put four months for this unit, the eight months remainder on a different form for the other unit. If it was all 12 months and it was all 12 months then that's fine as well. But it just need to be included on the form because we won't know for sure unless we see that information on there.

Line 8 is used to report the total rent paid based on Line 6 multiplied by Line 7. And it also gets reported on the claim form, or Schedule BEF, as appropriate and we'll talk about Schedule BEF in a moment.

The next part of this form is the landlord's oath. This is where the landlord would mark whatever designation was appropriate so that they were required - you know, if they were required to pay

2018 property taxes they would mark that. If they made a payment in lieu of taxes, they would mark that. If the property was exempt, they would check that oval. And if there's other names on the lease, they would also mark that besides, of course, the spouse or the minor child.

And then the landlord would sign and date. It's important that the landlord sign, date as well as check whatever oval is appropriate. If for some reason the claimant cannot get the landlord to sign this form, then the occupancy affidavit would need to be filled out. And so, again, this is only if they can't get the landlord's signature. So then the claimant would fill out this form and then it has to be notarized before it is submitted to the Department. And, again, for this particular form it has to be completed in its entirety even if the amount is zero before it is accepted by the Department.

So let's just talk about some of the other schedules that may need to be included with your rebate. Schedule A is that the homeowner either moved or passed away. If they sold one property and bought a second property, they would need to put the information for the first home as well as the second home on this form.

And so, again, if that's the case that the homeowner moved or passed away and needed to fill out Schedule A, they would put their names and full Social Security number on the form as well as the address for each home and the dates that they occupied during the claim year. So if they lived in a house and then sold it in the beginning of 2018, bought another house, lived in it for the rest of 2018, the information for both of those homes would need to be filled out on this form.

So the total property taxes paid for each of those properties, the number of days that each property was owned and occupied, the percentage that the home was occupied -- and there is a calculation for that -- and the total property taxes they paid based on the calculations. So that would all need to be filled out for Schedule A and then submitted with the claim form.

Schedule B, D and E are all on the same form. So let's first talk about what Schedule B is used for. Schedule B is used when the claimant was filing as a widow or widower and has now remarried during the claim year. We will allow the claimant to file as a widow or widower up to the date that they marry or until they reach age 65 because then they would be eligible just from age alone as opposed to the widow or widower status.

Schedule D is used for any renter who is receiving cash public assistance. The months that a claimant receives cash public assistance needs to be deducted from that month's rent for their yearly amount of rent paid.

Schedule E is for anyone who is using part of their home or part of their residence for a purpose other than their own personal residence. So, for instance, if there's any sort of business use either in the home or the rental property, that would need to be deducted based on the total amount of space. And there are calculations in there if that is the case on for how to calculate that. That's what Schedule E is used for.

Schedule F and G are also on the same form together and they're used when there are additional names on the lease. So I talked about the rent certificate before and the landlord having to sign and also indicate if there were additional people on the lease besides the spouse or a minor child. So if that's the case then Schedule F is used. If there is anyone other than those folks I indicated on the deed or the lease, the claimant will need to complete Part F.

For Schedule G this is used to file for decedents who need to remain as the claimant. So this is when for whatever reason the person wouldn't qualify on their own, whether it's an estate that's filing on the decedent's behalf, the personal representative. Maybe he's filing on the decedent's behalf. A widow or widower who maybe doesn't meet that age requirement to file as a widow or widower on their own behalf may need to still file on behalf of the deceased claimant instead.

In that case the decedent's income would actually need to be annualized or projected for what they would have made had they lived all year. So this form is used for those calculations for having annualized a decedent's income if they need to do that.

Another form that we sometimes get is a submission statement. It's used for a claimant that's not covered under Social Security or the Railroad Retirement Act that is unable to submit proof of a permanent and total disability. So the physician would fill out this form and it would be sent in along with the claim.

One important thing to note is that if the claimant was denied for Social Security disability benefits, they would not be able to use this form. So this does not take the place of that. Instead it would be a situation maybe where they haven't received a status yet or something like that. But if they have received a denial from Social Security then we would not be able to accept this form.

All right. So let's just talk about some additional tips. Some of these may be repeats of things that I've already mentioned. But there are sometimes things that will sometimes trip a claimant up so I just want to make sure to go over them.

So payments won't begin to be issued until July 1st and, again, that is by law. The fastest way to receive your rebate is to use direct deposit. That is the fastest way to actually get it in your hands. Providing a valid phone number on your form will allow us to make those automated calls in April and in June to let you know the status of your rebate.

Claimants can also get assistance at no cost at Department of Revenue district offices. Throughout the state we do have district office locations. And you can go into any of those offices and get assistance. The locations for those are on our Web site.

You can also get assisted at local area agencies on aging, senior centers as well as your state legislator's office. So there are definitely resources. Also calling in, if you just have a particular question about the form and what to fill out or what you need to submit for documentation, you can definitely call in as well or check online for resources.

Another thing is to make sure that all your documents are filled out, signed and any proof documents that are needed are included, especially for first-time filers making sure that they have submitted everything they need to prove age or to prove disability. And, again, make sure that they are copies and not originals. Even if something says not to copy it, again, we will not send the - if you send us an original, we will not send that back. So please make sure you send us copies of any proof documents.

If more than one person in the household qualifies, what we suggest is that you file using the person that would receive the greatest benefit. And sometimes the easiest way to do that is if just both of you fill out the form. See what that standard rebate looks like for each of you and then use whoever would get the higher rebate amount because we will only issue it to one person in the household.

The only sort of caveat to that is if the spouse is living in a personal care home or assisted living facility and the claimant is still living in either the home or in a different rental unit, they can file separate claims since they're paying rent or they're paying amounts to two separate places. And so both individuals, as long as they qualify from every other standard, could file separate claims.

Again, you can file on behalf of a deceased claimant as long as they lived at least one day during the claim year. So, again, if the spouse is eligible on their own, either just in general or due to a change in status then we would suggest that they file as the claimant.

If you receive Social Security benefits and the address they have on file is your PA address you do not need to submit a copy of this documentation. So you don't need to submit proof of your Social

Security benefit. We receive that from the Social Security Administration. Again, if it goes to your PA address, you do not need to submit that to us. However, if it's outside of PA you definitely do.

If the claimant is not a new filer, we send out a booklet with a preprinted label. If that label is correct you can use that for the name and address. We still need your social security number filled out on the very top of it but the label will have the preprinted name and address.

However it is important to make sure that the label is correct. If anything on the label is not correct, please do not use the label. Please just either type in everything or handwrite neatly everything in.

There was a small snafu this year. And incorrect labels got mailed out. We are in the process of fixing that. So if any of you did receive or know of anyone that received a misprinted label with the wrong claim year, this is being rectified. So the new ones are going out.

Again, if the landlord does not sign the rent certificate, the claimant can sign and get that notarized. However there needs to be some sort of explanation included on the form, whether, you know, the landlord maybe is on vacation and the deadline is approaching or whatever the reason may be, just some sort of explanation so we understand why that wasn't filled out.

Another thing is to make sure the tax bills are not stamped in red. Because of our scanning system, it can't read red and so it needs to be stamped in black. So, again, the tax bill needs to be stamped with the date the tax was paid, the amount that was paid and it needs to be stamped in black.

You should include any copies of income statements as proof documents. For proof of disability, we need the award letter rather than a benefit statement. Sometimes as proof document we get the benefit statement but we need a copy of the actual award letter. Again, it's a copy of that.

And then here are some resources that you can go to to get assistance. So our Web site that is a direct link to where all of the property tax rebate forms and instructions are on that particular slide. You can also check the rebate status online. Again, we do make those automated calls in April and in June. But you can check the rebate status online as well or by phone.

And then the last number is the customer service number. That is the number to our area. So if you need to call in if you have any questions about filing out the forms, you can definitely also contact us as well as visiting the district offices.

And with that, I am at the end of the formal presentation. So now let's look and see what questions we have received.

Okay. I apologize. I'm just trying to see if I can make the questions just a tad bit bigger.

Teresa McDonnell: Chantel, would you like me to read the questions?

Chantel Hardaway: That would be fantastic. Thank you so much.

Teresa McDonnell: Yes, absolutely. So the first question we received is will the form be rejected if only the last four of the Social Security number is listed?

Male 1: The form may not be rejected but we won't be able to easily establish it to the claimant's previous account or create a new account for the claimant. So it will definitely delay processing as we reach out to get that information.

Teresa McDonnell: Okay. And then along the same lines, will the form be rejected if one of the codes is missing?

Male 1: Are you talking just for a county code?

Teresa McDonnell: (Maria), can you give a little more clarity on the codes, please? I was going to say while we're waiting for (Maria), next question. For disability purposes, how is disability defined?

Male 1: Let me just make sure because unfortunately these terms have different meanings depending on what we're talking about. Are you talking to qualify for the permanent home disability?

Teresa McDonnell: Yes. The second part of the question was does veteran's partial disability ratings count?

Male 1: No.

Chantel Hardaway: It needs to be 100% for VA disability purposes for it to be considered eligible disability for the property tax rent rebate.

Teresa McDonnell: Thank you. If a person passed in January of this year, can it be filed for them? Can the form be filed for them?

Chantel Hardaway: Yes. The claim year was 2018. And so it can definitely be filed for them as well for when we hit next year and they're claiming for 2019 that person would want to look at whether they would be eligible to file themselves or whether they would file on behalf of the claimant since the claimant passed away in 2019. And, again, it's annualizing that income.

Teresa McDonnell: What if a person is in senior shared housing, can they file a claim?

Male 1: That's going to depend on a couple of factors. If it is a - it depends on if it's a county-owned facility or a government-owned facility because if there is no payment in lieu of taxes they aren't going to be eligible for a rent rebate claim or a property tax rent rebate claim.

If they are living in a facility, we would take a look at that facility and see how that person's co-occupation in the dwelling affects their eligibility. There are check boxes on the rental certificate that should be filled out so that our staff can take a look at the entire situation.

Chantel Hardaway: But in short we would definitely say file the claim and we will take a look based on all of the factors.

Teresa McDonnell: Okay. Thank you. Next question. So the parent of a disabled 10-year-old could be eligible for a rent rebate?

Male 1: No.

Chantel Hardaway: They unfortunately would not unless they qualified on their own for some specific reason. So with the disability it's actually age 18 or older. And the person who has the disability is filing as a claimant.

So if the parent qualified in a different way, then the parent absolutely could file for a rebate. But not on behalf of a child who is under 18.

Teresa McDonnell: Thank you. Next question. If you get a lump sum from a determination that is for a look back payment to disability filing, does that disqualify them for that year?

Male 1: Yes. If the income was received in the year then they would have to put that to put that on their property tax rent rebate claim and it could affect their eligibility. Everything comes based on the income that was received during the year.

Now we would encourage, once again, that you apply and send in the documentation so that we can look at it to see if there is an exception that would allow the person to become eligible.

In some situations, I hate to say that there are nuances that are a little bit more in-depth to be able to go into - sorry, that we can't go into in this forum. But that's why we ask for the documentation and then we encourage everyone to file so that we can take a look at the claim and determine eligibility.

Teresa McDonnell: Next question. What if people rent from a private landlord and not a housing authority and they have money order receipts?

Chantel Hardaway: So the easiest thing is if the landlord will sign the landlord's oath and then we don't need the receipts. However, if they're money order receipts and they have the receipt of it being paid, they would just need to get that notarized and sign the second part where it's the occupancy affidavit.

But, yes, whether it's private or a housing authority, as long as the other eligibility requirements are met, that's fine.

Teresa McDonnell: Okay. And then in one of the slides you had talked about descendants. Who gets the descendant's payment?

Chantel Hardaway: So that would depend on who is filing for it. So it can go to an estate. It can also go to a personal representative. So it depends on who is filing on behalf of that person.

And, again, if it is the spouse, if they qualify as a widow or widower, we would suggest that they just file that way instead. And there's a little oval in Section A that says the spouse is deceased that they would also mark. But, yes, we can pay the personal representative or the estate.

Teresa McDonnell: Next question, where can an individual get a form to fill out?

Chantel Hardaway: So the form is available on our Web site. The easiest way to get to it so if you have a copy of these slides that second link where it says property tax rent rebate forms and instructions, it's right there. And it will say the PA-1000. Right there is the form. If you go on our website and just search PA-1000 the form will also pop up as well.

Teresa McDonnell: Okay. Next question if a renter lives the first part of 2018 in a different property then the last, say, nine months, is it okay that they only claim rent paid for the nine months of their current residence?

Male 1: So they lived in Pennsylvania for all 12 months, but they only have the receipts to show the nine months? Is that kind of the question?

Teresa McDonnell: Possibly. It looks like it reads, and, (Christine), if you want to provide more information please do. Just if they lived in one property and then they lived in a different property currently.

Male 1: Yes.

Teresa McDonnell: So it looks like they only want to file for one property.

Male 1: If they only want to file for the one property that is fine. They are allowed to do that. But they are eligible for the full 12 months of the rent that they paid. The only requirement that we do have is that you fill out a separate PA-1000 RC rent certificate for each of the properties.

Teresa McDonnell: And then there was one last question and it was more, I guess, clarification, which name will be signed, the landlord or the tenant? Can you go back through, the landlord form - which forms need to be signed by which person, the occupancy affidavit?

Chantel Hardaway: Absolutely. So for the rent certificate, the landlord really should sign. So best case scenario, the form is filled out. The renter fills out their initial information on the very top with, you know, some of the landlord's information. And then four through eight gets filled out either by the claimant or the landlord fills that out. And then the landlord would sign the landlord oath and this would be submitted.

This occupancy affidavit is only if you can't get the landlord's signature for whatever reason. And so then at that point the claimant or dependent would sign this form and they would also get it notarized. But that's only if you can't get the landlord's signature. So it's an either or on this particular form.

And then I happened to peek at the questions really quick and just saw someone thought if they might not be able to get the landlord's signature, if you still have those rent receipts from those three months, you can fill out the form for those three months and do the occupancy affidavit instead of the landlord's oath and then get that notarized for that first three month period if you have the receipts.

If you don't have the receipts and the landlord won't sign, that is a different issue. But, yes, so landlord signature. If the landlord will not sign then the tenant signature and notarized.

Teresa McDonnell: Okay. Could you please clarify again how to count veteran's benefits?

Chantel Hardaway: So Veterans benefits are not counted differently. Social Security is counted half. Railroad Tier 1 is also counted half. For the civil service that is a standard deduction. But everything else is just counted as income.

For purposes of VA disability, 100% disabled would qualify the person under the 18 to 64 category for that purpose. I'm not sure if I answered that question. So if I did not, please provide additional information in chat.

Teresa McDonnell: I'm giving it a minute to see if any other additional questions come in. In the meantime if you do have other questions, please feel free to email them to me at teresasmcdonnell@maximus.com and I will be sure to get those out to Chantel and her team.

Also after the Webinar, please take some time to give us your feedback by completing the Webinar survey at the end of this call. You will receive an email with a survey link. It also will include a copy of the presentation today in PDF format.

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Chantel, I did not see any other questions come in. So thank you, everyone, for participating in today's Webinar. We greatly appreciate it. We hope everybody has a great day. Stay warm and stay safe.

Chantel Hardaway: Thank you all very much for attending.