

First Time Filer:

Were you or your spouse 65 years or older on December 31 of the claim year? Y N

- 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

- If yes, you must submit proof of age (see table below for acceptable proof of age)
- 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

- If yes, you must submit proof of age (see table below for acceptable proof of age)
 - 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:

- 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

Acceptable Proof of Permanent Disability:

- 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 property owner the entire claim year?

Y N

- If yes, you must submit proof of tax paid.

Were you a renter the entire claim year?

Y N

- If yes, you must submit proof of rent paid. (i.e. PA-1000 Schedule RC)

Were you an owner/renter during the claim year?

Y N

- If yes, you must submit proof of both real estate and rent tax paid.

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

Acceptable Proof of Rent 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.

Acceptable Proof of Taxes Paid:

- 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.

IMPORTANT: Required documents must be electronically uploaded with your electronic application. If your documents are not able to be electronically uploaded with your application, you will have to file a paper application. *Accepted file types include pdf, jpeg, jpg, png, gif, tiff, and heic.*

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.

Did you receive any of the following income during the claim year?

Social Security, SSI, and/or SSP	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		
Railroad Retirement Tier 1 Benefits	Y	N
<input type="checkbox"/> If yes, you must submit a copy of your RRB-1099		
Pension, an Annuity, or an IRA Distribution	Y	N
<input type="checkbox"/> If yes, you must submit a copy of your 1099-R		
Railroad Retirement Tier 2 benefits	Y	N
<input type="checkbox"/> If yes, you must submit a copy of your RRB-1099		
Interest income	Y	N
<input type="checkbox"/> If yes, you must submit a copy of your 1099-INT or a copy of your PA-40		
Dividend income	Y	N
<input type="checkbox"/> If yes, you must submit a copy of your 1099-DIV or a copy of your PA-40		
Gain (or a Loss) on the Sale or Exchange of Property	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		
Income (or a Loss) from Rent, Royalty, Patents, or Copyrights	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		
Income (or a Loss) from Business or Farming	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		
Wages, salaries, bonuses, and/or commissions	Y	N
<input type="checkbox"/> If yes, you must submit a copy of your W-2 or a copy of your PA-40		
Income from an Estate or Trust	Y	N
<input type="checkbox"/> If yes, you must submit a copy of your RK-1 or a copy of your PA-40 and Schedule J		
Gambling/Lottery winnings (including PA Lottery winnings, prize winnings, and the value of other prizes)	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		
Inheritance, alimony, and/or spousal support	Y	N
<input type="checkbox"/> If yes, you must submit proof of the income received		
Cash Public Assistance during the entire claim year?	Y	N
<input type="checkbox"/> If yes, you are not eligible to claim a rebate		
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		
Unemployment compensation	Y	N
<input type="checkbox"/> If yes, you must submit a copy of your UC-1099-G		
Workers' compensation	Y	N
<input type="checkbox"/> If yes, you must submit proof of the income received		
Insurance Benefits - Loss of Time, Disability, and/or Life (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		
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.		