



Property Tax/Rent Rebate Program

Agenda

- **What's New**
- **How to Help your Constituents**
- **Program Overview**
- **Filing a PA-1000**
- **Helpful Tips To Avoid Delays**
- **Checking Rebate Status**
- **Denied Applications**
- **Resources**

The background features a repeating pattern of various geometric shapes and symbols, including hexagons, circles, plus signs, minus signs, and dotted lines, in shades of blue, purple, and grey. The pattern is set against a light blue background with a dark blue and gold border at the top and bottom.

What's New

Coming Soon for 2023 Claim Year

- House Bill 1100, signed August 2023
- Maximum Eligibility Income increased to \$45,000
- Maximum Standard Rebate increased to \$1,000
- Future years will see increase based on annual inflation



PENNSYLVANIA PROPERTY TAX or RENT REBATE PROGRAM 2023

PA-1000 Booklet 04-23

pennsylvania
DEPARTMENT OF REVENUE
BUREAU OF INDIVIDUAL TAXES
HARRISBURG, PA 17120-0020
www.revenue.pa.gov

APPLICATION INSIDE

	INCOME	MAX. REBATE
HOMEOWNERS 	\$ 0 to \$ 8,000	\$ 1,000
	\$ 8,001 to \$ 15,000	\$ 770
	\$ 15,001 to \$ 18,000	\$ 460
	\$ 18,001 to \$ 45,000	\$ 380
RENTERS 	\$ 0 to \$ 8,000	\$ 1,000
	\$ 8,001 to \$ 15,000	\$ 770
	\$ 15,001 to \$ 18,000	\$ 460
	\$ 18,001 to \$ 45,000	\$ 380

NOTE Applicants can exclude one-half of all Social Security income.

IMPORTANT DATES
Application deadline: **JUNE 30, 2024**
Rebates begin: **EARLY JULY, 2024**

NOTE: The department may extend the application deadline if funds are available.

Rebates for eligible seniors, widows, widowers and people with disabilities.

PENNSYLVANIA LOTTERY
Search for Pennsylvania's Best Deal

New Eligibility Table

INCOME	MAX REBATE
\$0 - \$8000	\$ 1,000
\$8,001 - \$15,000	\$ 770
\$15,001 - \$18,000	\$ 460
\$18,001 - \$45,000	\$ 380

Supplemental Rebates for 2023

- No changes to supplemental income eligibility under new law

Property owners with \$30,000 or less of total income that either:

Live in Philadelphia, Pittsburgh, or Scranton

-OR-

Have a high tax burden (taxes are 15% or more of their total income)

No Action needed on the application.

The supplemental rebate is automatically calculated

Supplemental Rebate Table

Income	Standard Rebate	Supplement (Kicker)	Total Max Rebate
\$0 - \$8,000	\$1,000	\$500	\$1,500
\$8,001 - \$15,000	\$770	\$385	\$1,155
\$15,001 - \$18,000	\$460	\$230	\$690
\$18,001 - \$30,000	\$380	\$190	\$570

Spanish Instructions

PA-1000 Instructions in Spanish
(online only)

Spanish Filing

PA-1000 will be available in Spanish
via myPATH January 2024

PROGRAMA DE REEMBOLSO DE IMPUESTOS A LA PROPIEDAD Y ALQUILERES DE PENNSILVANIA 2022

PA-1000 Booklet 06-23 (ESPAÑOL)

REQUISITOS PARA LA SOLICITUD

PROPIETARIOS	INGRESO	REEMBOLSO MÁX.
	\$0 a \$8,000	\$650
	\$8,001 a \$15,000	\$500
	\$15,001 a \$18,000	\$300
	\$18,001 a \$35,000	\$250
INQUILINOS	INGRESO	REEMBOLSO MÁX.
	\$0 a \$8,000	\$650
	\$8,001 a \$15,000	\$500

NOTA Los solicitantes pueden excluir la mitad del ingreso total del Seguro Social.

FECHAS IMPORTANTES

Fecha límite para presentar la solicitud:
30 DE JUNIO DE 2023

Inicio de los reembolsos:
PRINCIPIOS DE JULIO DE 2023

NOTA: El departamento puede prorrogar la fecha límite para la presentación de la solicitud si se dispone de fondos.

Reembolsos para personas mayores, viudos, viudas y personas con discapacidades elegibles.

PA-1000 Booklet 06-23 (ESPAÑOL)

REEMBOLSO DE IMPUESTOS A LA PROPIEDAD Y ALQUILERES DE PENNSILVANIA

REEMBOLSO DE IMPUESTOS A LA PROPIEDAD Y ALQUILERES DE PENNSILVANIA

The background features a repeating pattern of various geometric shapes and symbols in shades of blue, purple, and grey. These include hexagons, circles, squares, and plus signs, some solid and some outlined. The pattern is set against a light blue background with a white border around the central text box.

How to Help Your Constituents

Proof Document Checklist



PTRR Proof Document Checklist

First Time Filer:

- Were you or your spouse 65 years or older on December 31 of the application 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 application 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 application 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 disability)
 *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.
- Are you completing an application for Property Tax/Rent Rebate due a decedent? **Y N**
 If yes, you must submit a completed DEV-41

NOTE: To determine if a deceased individual is eligible for a rebate, the application must also include an annualized income amount in the calculation of total household income. See Schedule G, specifically the instructions for Line 11g, for information on the calculation of annualized income to be included in household income.

A copy of the death certificate must also be included with the application.

Acceptable Proof of Age:

- Birth Certificate
- Blue Cross or Blue Shield 63 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.

2024-01



PTRR Proof Document Checklist

Rebate Type:

- Were you a property owner the entire application year? **Y N**
 If yes, you must submit proof of real estate taxes paid (see table below for acceptable proof of taxes paid).
- Were you a renter the entire application year? **Y N**
 If yes, you must submit PA-1000 Schedule RC (see table below for acceptable proof of rent paid).
- Were you an owner/renter during the application year? **Y N**
 If yes, you must submit proof of both real estate taxes and a completed PA-1000 Schedule RC.

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

Acceptable Proof of Rent Paid:

A renter must submit a fully completed PA-1000 RC, Rent Certificate, filled out by the landlord(s), for each place they rented during the year. The landlord or their authorized agent should complete Lines 1 through 8 and complete the Landlord's Oath.

If the renter cannot get their landlord complete the Landlord's Oath, a completed PA Rent Certificate along with the notarized Occupancy Affidavit must be included.

Alternatively, they can submit a completed PA Rent Certificate along with copies of their rent receipts for each period in which they paid the rent. However, the receipts must include the landlord's or agent's signature, the full amount of rent paid, the applicant's name, and the complete address of the rental property. Rent receipts will not be accepted on their own.

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.
- If there are multiple owners listed on the tax bills (other than the spouse or minor child), you will need to complete a PA-1000 Schedule F.

IMPORTANT: Required documents must be submitted with the application. If you are filing electronically myPATH will accept the following file types: pdf, jpeg, jpg, png, gif, and tiff. If your documents are not able to be electronically uploaded, you will have to file a paper application.



File online with ease-
Scan here to learn how!

2024-01



PTRR Proof Document 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 application.

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

- Social Security, SSI, and/or SSP **Y N**
 If yes and you are using a PA address, you are not required to submit proof of this income
 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**
 If yes, you must submit a copy of your RRB-1099
- Pension, an Annuity, or an IRA Distribution **Y N**
 If yes, you must submit a copy of your 1099-R
- Railroad Retirement Tier 2 benefits **Y N**
 If yes, you must submit a copy of your RRB-1099
- Interest income **Y N**
 If yes, you must submit a copy of your 1099-INT or a copy of your PA-40
- Dividend income **Y N**
 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**
 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**
 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**
 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**
 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**
 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**
 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**
 If yes, you must submit proof of the income received
- Cash Public Assistance during the entire application year? **Y N**
 If yes, you are not eligible to claim a rebate
- Cash Public Assistance during part of the application year? **Y N**
 If yes, you must submit copies of your Department of Human Services cash assistance statements
- Unemployment compensation **Y N**
 If yes, you must submit a copy of your UC-1099-G
- Workers' compensation **Y N**
 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**
 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**
 If yes, you must submit a copy of your 1099-R and you should report the amount listed in the PA-1000 instruction booklet.

IMPORTANT: If the customer does not have supporting documentation to verify income received, an explanation should be submitted with the application.

2024-01

The background features a repeating pattern of various geometric shapes and symbols, including hexagons, circles, squares, and plus signs, in shades of blue, grey, and white. The pattern is set against a light blue background with a white border at the top and bottom.

Program Overview

The background features a repeating pattern of various geometric shapes and symbols in shades of blue, grey, and white. These include hexagons, circles, squares, and plus signs, some solid and some outlined. The pattern is set against a light blue background with a white grid. The top and bottom edges of the slide are decorated with a dark blue and a gold-colored border, respectively.

Eligibility

Type of Filer: **Categories**

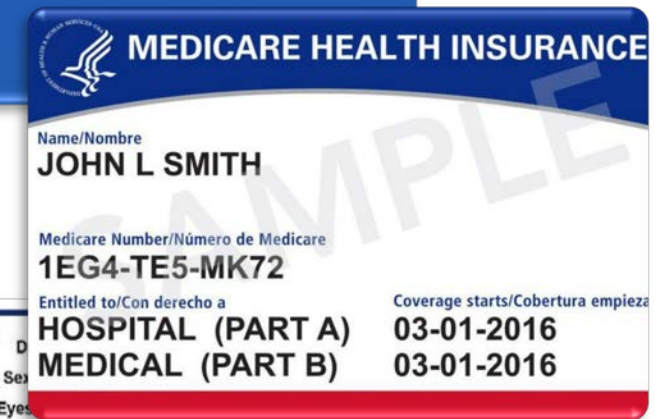
- A** 65 or older by December 31 of the application year
- B** Married to individual that is 65 by December 31 of the application year
- C** Widow/widower age 50-64 by December 31 of application year
- D** Permanently disabled age 18-64 by December 31 of application year



Proof Documents

Proof Documents: Age

- PA Driver's License or Identification Card
- Birth Certificates
- Passport
- PACE/PACENET Card
- Medicare Card



Proof Documents: **Widow or Widower**

- Spouse's death certificate (verifying applicant was married to decedent at time of death)



Proof Documents: Disability

- Social Security (SS) disability award letter
- Supplemental Security Income (SSI) disability award letter
- Railroad Retirement (RR) permanent and total disability award letter
- Black Lung disability award letter
- Veterans Administration (VA) award letter – must state 100% disabled
- Federal Civil Service disability award letter – must state 100% disabled
- Physician Statement

NOTE: If applicant is denied through Social Security Administration, they are not eligible for the program.

Rebate Status

Type of Filer: **Rebate Status**

P Property Owner

R Renter

B Owner/Renter

Definition: **Property Owner**



Applicant owned the home

- Must have deed, will or life estate

Applicant occupied the home

- Rebates are for primary residence only

Taxes must have been paid for application year

- Taxes do not have to be paid by the applicant personally

Definition: **Renter**



Rented and occupied:

- home, apartment
- nursing home
- boarding home
- similar residence in PA

Applicant has a true landlord/tenant relationship

- Not eligible if property is tax-exempt

Cash public assistance (Schedule D)

- Not eligible for a rebate for the month(s) assistance was received or if received for entire year

Definition: **Owner/Renter**



Owned, occupied and paid taxes for part of year.
Paid rent for other portion of the year.

Complete the schedule A

Mobile homes (owns home, rents lot or vice versa)

Submit receipted tax bills, and a completed rent certificate

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Income

Qualifications: **Income**

Property Owner:

- Household income (applicant and spouse residing together) of **\$45,000*** or less

Renter:

- Household income (applicant and spouse residing together) of **\$45,000*** or less

Owner/Renter:

- Household income (applicant and spouse residing together) of **\$45,000*** or less

* Applicants can exclude half of Social Security or Railroad Retirement Tier 1 income and take a deduction for Civil Service Retirement System income.

The background features a repeating pattern of various geometric shapes including hexagons, circles, squares, and lines in shades of blue and grey. A central grey rectangular box with a white border contains the text.

Deceased Applicants

Who May File: Deceased Applicants

Surviving Spouse

- Applicant's death certificate
- Sign as surviving spouse
- If eligible to file, should file as applicant (mark deceased spouse oval)

Estate

(court appointed executor/executrix)

- If there's a will:
Short Certificate
- If no will:
Decree of Distribution

Personal Representative

- Received copy of funeral bills
- NOTE:** rebate cannot exceed the amount paid in funeral expenses


DEX-41 (EX) 04-02 (P)
 BUREAU OF INDIVIDUAL TAXES
 PO BOX 280508
 HARRISBURG PA 17128-0508

**APPLICATION FOR
 PROPERTY TAX/RENT
 REBATE DUE THE DECEDENT**

SECTION I DECEDENT INFORMATION

Name of Decedent _____ Date of Death _____ Decedent's Social Security Number _____

SECTION II APPLICATION SUBMITTER INFORMATION

Name _____

Street Address _____ State _____ ZIP Code _____

City _____

I am filing this application as (select only one oval)

- The surviving spouse. (Attach a copy of the decedent's death certificate.)
- The personal representative of the decedent's estate. (Attach a copy of a short certificate or court order showing your appointment.)
- The personal representative of the decedent where a will has **NOT** been probated or where there is no will. (Attach a copy of the decedent's death certificate and a receipted copy of the claimant's funeral bill and proof that you directly paid for funeral expenses that are equal to or greater than the amount of the rebate being claimed. Acceptable proof of this payment include the front and back of the canceled check, a credit card/bank statement, or other document showing you personally paid for the funeral expenses. State your relationship to the decedent: _____ Sign the affidavit below and have your signature notarized.)

SECTION III AFFIDAVIT

Complete Section III only if Oval 3 is selected in Section II.

I am making a request for monies due the decedent and certify that the information provided on this claim has been examined by me and is to the best of my knowledge, true and correct. Any monies that I receive as a result of this claim will be disbursed according to the laws of the Commonwealth of Pennsylvania.

PLEASE SIGN AFTER PRINTING

 (SIGNATURE OF PERSON FILING THIS CLAIM)

SECTION IV NOTARIZATION

Subscribed and sworn before me this _____ day of _____ 20__ -

PLEASE SIGN AFTER PRINTING

 (SIGNATURE OF NOTARY PUBLIC)

PRINT

Reset Entire Form **TOP OF PAGE**

Filing on Behalf of a Decedent

- Must have lived at least one day of application year
- May apply for taxes **OR** rent paid during the time period the application was alive and occupied the property
- DEX-41
- Schedule A & G

Properly Indicating Decedent Status

Section I

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 MM/DD/YY Spouse's Birthdate MM/DD/YY Daytime Telephone Number

If Spouse is Deceased, fill in the oval.

Section II

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, 2021, 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

Filing a PA-1000

Program Overview

DUE DATE:

June 30th or December 31st

ONE PER HOUSEHOLD:

If more than one person qualifies for the rebate, file under the one with the least income

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Electronic Filing



The screenshot shows the myPATH Pennsylvania website. At the top left is the "my PATH PENNSYLVANIA" logo. To the right is a dark login box with a "Log in" button, a link for "Forgot username or password?", a "Sign Up" button, and a link "Do I need to sign up?". A red arrow points from the right towards the "Do I need to sign up?" link. Below the header is a search bar with the text "What are you looking for?". The main content area is a grid of nine service tiles, each with a header, a brief description, and a list of links. The tiles are: Payments, Returns, Registration, Rebates, Refunds, Identity Verification, Additional Services, Tax Compliance, and Learn More. A red border highlights the entire grid of service tiles.



Payments

Electronically pay a bill, submit estimated and extension payments, make a return payment, and more...

- > Make a Payment
- > Track My Payments and Credits
- > Setup a Payment Plan



Returns

File your returns

- > File a PA Personal Income Tax Return
- > Presentar una declaración de impuestos sobre la renta personal de PA para 2022
- > Presentar una declaración de impuestos sobre la renta personal de PA para 2021
- > How to File Business Tax Returns
- > File a Use Tax Return
- > Verify 1099-G or 1099-INT Amount



Registration

Register a new business entity or existing business entity new to PA for tax accounts and services online.

- > Pennsylvania Online Business Tax Registration
- > What's the Status of my Registration?



Rebates

View my rebate status or apply for a rebate.

- > Apply for a Property Tax/Rent Rebate for 2022
- > Where's My Rebate?



Refunds

View my refund status or verify my tax refund to expedite processing.

- > Where's My Refund?



Identity Verification

Respond to a Request to confirm your identity.

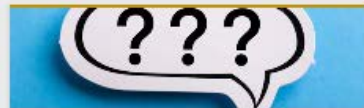
- > Take ID Verification Quiz
- > Enter Verification Code



Additional Services



Tax Compliance



Learn More

Apply for a Property Tax/Rent Rebate

- No log in required
- Apply for a rebate for current period



Rebates

View my rebate status or apply for a rebate.

- > [Apply for a Property Tax/Rent Rebate for 2022](#)
- > [Where's My Rebate?](#)

Property Tax/Rent Rebate Application

Property Tax/Rent Rebate Application



Introduction

Before we begin, you should know...

Filing your Pennsylvania Property Tax/Rent Rebate (PA-1000) in myPATH is [free](#).

Pennsylvanians age 65 and older; widows and widowers age 50 and older; and people with disabilities age 18 and older may be eligible for a Property Tax/Rent Rebate if they meet certain [eligibility requirements](#).

If applicable, please have these potentially required documents nearby and available to be electronically uploaded with your application:

- Proof of age
- Proof of disability
- Proof of death
- Proof of income
- Proof of taxes paid
- Proof of rent paid
- DEX-41

Accepted file types include pdf, jpeg, jpg, png, gif, tiff, rtf, and heic. **If your attachments are not able to be electronically uploaded with your application, you will have to file a [paper application](#).**

You may navigate between steps with the navigational buttons below the application and also by selecting a specific step from the navigation bar above the application.

Cancel

< Previous

Next >

Application Questions

- Answer required questions
 - Applicant's date of birth
 - Owner and/or renter
- Questions are intuitive

Questions

What is the claimant's date of birth? *

Required



Is the claimant an owner and/or a renter? *

Required



Is the claimant a first time filer? *

Yes	No
-----	----

Is the claim being filed by a preparer? *

Yes	No
-----	----

Has the claimant owned and lived in more than one home this year? *

Yes	No
-----	----

Has the claimant used their home for purposes other than their personal residence? *

Yes	No
-----	----

Has the claimant received cash public assistance? *

Yes	No
-----	----

Is the claimant filing on behalf of a decedent? *

Yes	No
-----	----

Does the claimant have an additional name on their deed or lease other than their spouse or minor children? *

Yes	No
-----	----

Application Questions

Owner over 65 (example)

Question	Answer
First time filer?	Yes
Filed by a preparer?	Yes
Filed by the applicant's POA?	No
More than one home?	No
Home used for other purposes?	No
Filing on behalf of a decedent?	No
Additional name on deed or lease?	No

Application Questions

- First time filer
- Filed by a preparer

Questions

What is the claimant's date of birth?

09-Nov-1950



Is the claimant an owner and/or a renter?

Owner



Is the claimant a first time filer?

Yes

No

Is the claim being filed by a preparer?

Yes

No

Is this being filed by the claimant's POA?

Yes

No

Has the claimant owned and lived in more than one home this year?

Yes

No

Has the claimant used their home for purposes other than their personal residence?

Yes

No

Is the claimant filing on behalf of a decedent?

Yes

No

Does the claimant have an additional name on their deed or lease other than their spouse or minor children?

Yes

No

Primary Income

Primary Income received by you and your spouse

Social Security (SSA) income. Enter Box 5 of your SSA-1099 Benefits statement	4,788.00
Social Security Disability (SSI) income.	0.00
State Supplementary Payment (SSP) income.	0.00
Railroad Retirement Tier 1 Benefits.	0.00
Total Benefits from Pension, Annuity, IRA Distributions and Railroad Retirement Tier 2 (Do not include federal veterans' disability payments or state verterans' payments)	0.00
Salaries, wages, bonuses, commissions, and estate and trust income	0.00
Interest and dividend Income	0.00
Gain or loss on the sale or exchange of property	0.00
Net rental income or loss	0.00
Net business income or loss	0.00

Other Income

Other Income received by you and your spouse

Gambling and Lottery winnings, including PA Lottery winnings, prize winnings and the value of other prizes	0.00
Cash public assistance/relief. Unemployment compensation and workers' compensation, except Section 306(c) benefits	0.00
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	0.00
Value of inheritances, alimony, and spousal support	0.00
Gifts of cash or property totaling more than \$300, except gifts between members of a household	0.00
Miscellaneous income and annualized income amount	0.00
Claimants with Federal Civil Service Retirement System Benefits enter \$9,514 or \$19,028 if both you and your spouse received CSRS benefits.	0.00
Total Income	2,394.00

Rebate

Property Tax/Rent Rebate Application



Questions



Primary Income



Other Income



Rebate

Total 2021 property tax. Submit copies of receipted tax bills. 3,208.00

Property Tax Rebate. Compare the maximum standard rebate amount for your income level to the total property tax paid and enter the lesser amount to the right. 650.00

The maximum rebate amount for your income level, \$2,394, is displayed on the right. 650.00

Cancel

Previous

Next

Claimant Social Security Number

***-**-0000

Spouse's Social Security Number

If Primary is Deceased, check the box

If Spouse is Deceased, check the box

Last Name

HOMEOWNER

First Name

SANDRA

Middle Initial

Claimant's Birthdate

01-Apr-1937

Spouse's First Name

Spouse's Last Name

Middle Initial

Spouse's Birthdate



Phone Country

USA



Phone Type

Cell Phone



Daytime Phone Number

(717) 000-0000

Email

email@email.com

Spouse's Email

Address *

Required

Verify Address

County as of Dec. 31st

DAUPHIN





Would you like your rebate to be direct deposited?

Yes

No

Verify Address

Address Search ? ×

Verified	Select this address
 393 WALNUT ST HARRISBURG PA 17128-2005	
As Entered	Select this address
 393 WALNUT ST HARRISBURG PA 17128	

Cancel Save

- Select the correct address if multiple results
- Select **Save** to continue

Direct Deposit

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. 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 the direct deposit lines.

Select the type of bank account in which you authorize the Department of Revenue to directly deposit your rebate

Checking	Savings
----------	---------

Account Number

000000000

Routing Number - WELLS FARGO BANK

053101561

Confirm Account Number

000000000

- Select account type: Checking or Savings
- Bank name automatically populates when routing number is entered
- Enter and confirm the account number

Attachments

Attach required documentation (pdf,jpeg,jpg,png,gif,tiff,rtf):

- Proof of Age
- Proof of Disability
- Proof of Income
- Proof of Taxes paid

Attachments

Add



Type	Name	Description	Size
------	------	-------------	------

There are no attachments.

- myPATH advises which types of documentation are required for the applicant
- Select Add to upload documents
- Acceptable file types - pdf, jpeg, jpg, png, gif, tiff, rtf

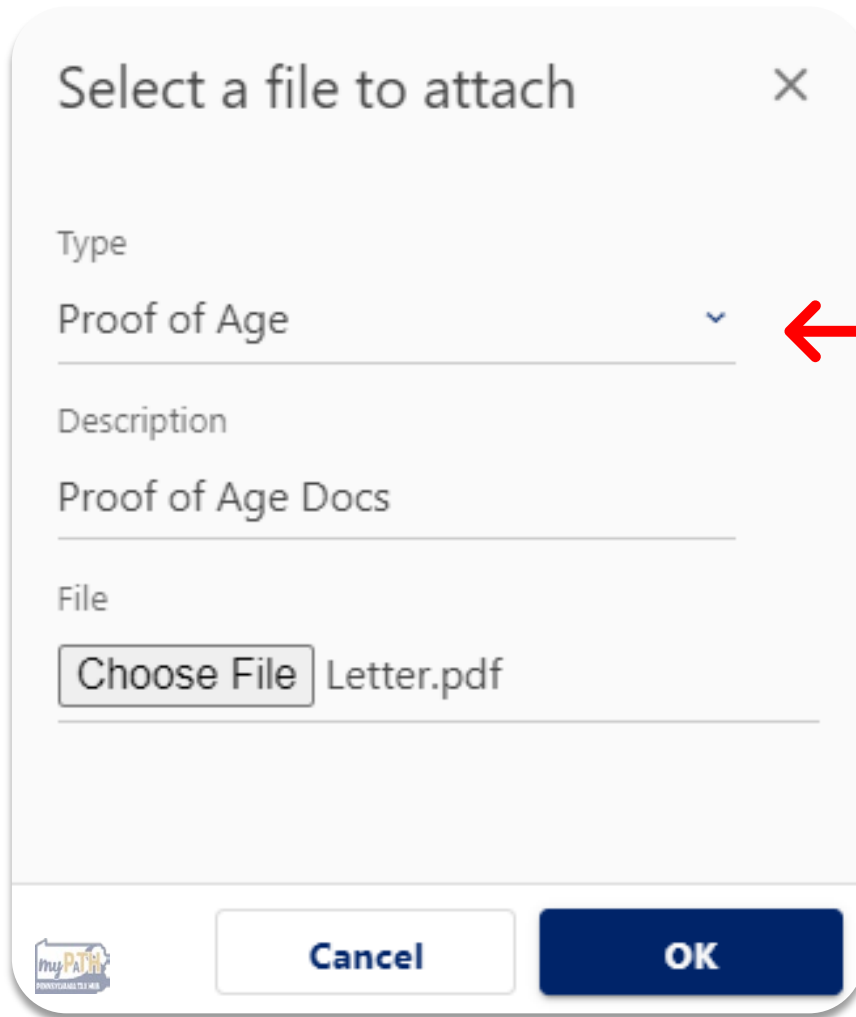
Add Attachments

Select a file to attach ×

Type
Proof of Age ▼

Description
Proof of Age Docs

File
 Letter.pdf



- Required*
- Proof of Age
- Proof of Disability
- Proof of Income
- Proof of Taxes Paid

- Select the type of documentation from drop-down
- Enter description of uploaded document
- Choose file to upload

Attachments

Attach required documentation (pdf,jpeg,jpg,png,gif,tiff,rtf):

- Proof of Age
- Proof of Disability
- Proof of Income
- Proof of Taxes paid

Attachments

Add

Type	Name	Description	Size
Proof of Age	Letter.pdf	Proof of Age Docs	138 Remove

Cancel

Previous

Next

- Can add multiple attachments
- Select **Remove** if file uploaded in error

Applicant Oath

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 filled 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.

PREPARER: I declare that I prepared this return, and that it is to the best of my knowledge and belief, true, correct and complete

Preparer's Name.

DISTRICT 106

Preparer's telephone number

(717) 534-1323

- Enter the District Office Number under the preparers name
- Enter the phone number for your office

Summary

Property Tax/Rent Rebate Application



Summary

Claimant Name : HOMEOWNER, SANDY
Email : email@email.com
Address : 393 WALNUT ST HARRISBURG PA 17128-2005
Expected Rebate : \$650.00

Cancel

Previous

Submit

Duplicate Claim Message

Progress bar: [] Personal Information [✓] Attachments [✓] Review [✓] Claimant Oath [✓] Summary [>]

! A PA-1000 has already been filed under this SSN for this tax year. If you feel this is an error, please contact the Customer Experience Center at 717-425-2495 Ext 72841 Monday through Friday between 8:00 A.M. and 5:00 P.M.

OK

Expected Rebate : \$650.00

- Determine if your customer already filed
- If they did not contact the legislative office for assistance.

Summary

Confirmation



By submitting this form, you agree to the following statement: I declare under penalty of perjury that all of the information I have provided on this transaction is true, correct and complete. I acknowledge that false statements on this transaction are punishable pursuant to 18 PA. C.S.A. A§ 4904 (unsworn falsification to authorities).

Cancel

OK



Confirmation

By submitting this form, you agree to the following statement: I declare under penalty and perjury that all of the information I have provided on this transaction is true, correct and complete. I acknowledge that false statements on this transaction are punishable pursuant to 18 PA. C.S.A. A§ 4904 (unsworn falsification to authorities).

Confirmation

< Home

Confirmation

We have received your 2022 Property Tax/Rent Rebate Application.

You may view your submission by returning to [myPATH](#) and navigating to **Find a Submission** and use your email **jochriseme@pa.gov** and confirmation code **kbfr4j**.

Customer Name:	TAXPAYER, ANDY
Filing Period:	31-Dec-2022
Submission Type:	2022 Property Tax/Rent Rebate Application
Confirmation Code:	kbfr4j
Email Address:	jochriseme@pa.gov
Submitted Date:	12/15/2023
Requested Rebate Amount:	\$650.00

Rebates are typically not issued until after July 1st.


[Printable View](#)

[OK](#)


Obtaining a Copy of Electronic Application

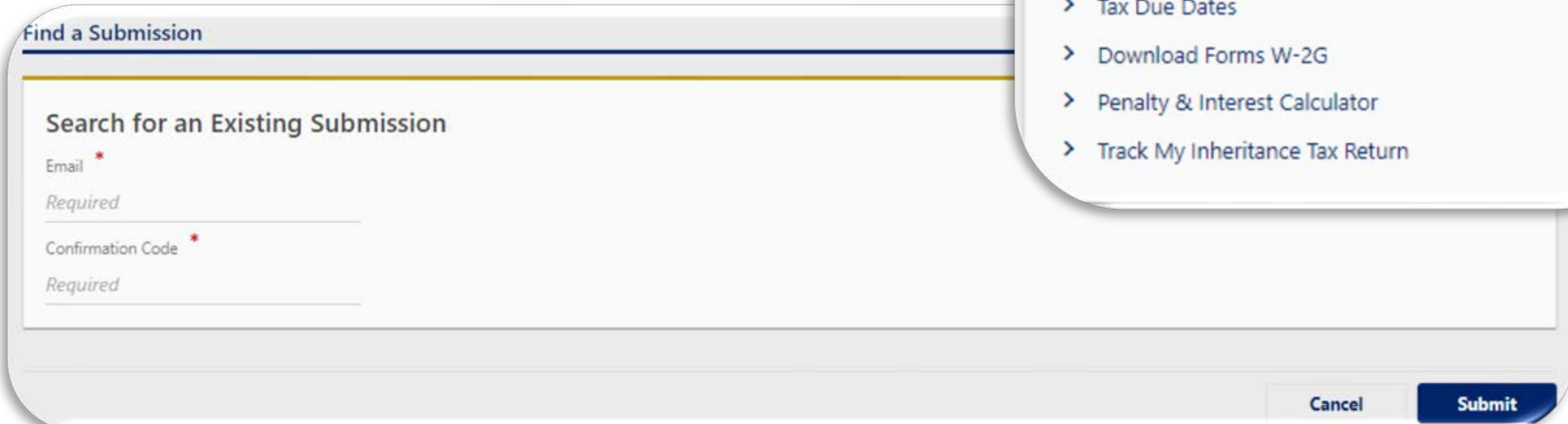
Step 1: Select Find a Submission on the Additional Services Panel in myPATH

Step 2: Enter the email used to file the claim and enter the confirmation code received upon completion



Additional Services
Additional myPATH services for taxpayers

- > Respond to a Letter
- > Find a Submission 
- > Tax Due Dates
- > Download Forms W-2G
- > Penalty & Interest Calculator
- > Track My Inheritance Tax Return



Find a Submission

Search for an Existing Submission

Email *
Required

Confirmation Code *
Required

Cancel Submit

Obtaining a Copy of Electronic Application

Step 3: Select the “Print” hyperlink on the summary screen for a copy of the claim

2022 Property Tax/Rent Rebate Application

Submitted
Confirmation #
0-000-072-959
Submitted 03-Nov-2023 14:32:17

> Delete
> Print

2022 Property Tax/Rent Rebate Application

Summary

Summary

Claimant Name : DOE, JOHN
Email : jochriseme@pa.gov
Address : 1706 PENN ST HARRISBURG PA 17102-2345
Expected Rebate : \$650.00

pennsylvania DEPARTMENT OF REVENUE HARRISBURG, PA 17103-0001

2022 Property Tax/Rent Rebate Application

Period Submitted Confirmation # 31-Dec-2022 03-Nov-2023 0-000-072-959

Taxpayer
Name: DOE, JOHN
Address: 1706 PENN ST HARRISBURG PA 17102-2345
Phone Number: (717)-772-9209
Email: jochriseme@pa.gov
Date of Birth: 11/6/1950
Claimant SSN: ***-**-6789

Summary

1. Filing Rebate as:	Property Owner	
2. I Certify that as of 31-Dec-2022, I am a:	Claimant age 65 or older	
3. Filing on behalf of a decedent:	No	
4. Social Security, SSI and SSP Income:	\$7,500.00	\$0.00
5. Railroad Retirement Tier 1 Benefits:	\$0.00	\$7,500.00
6. Total Benefits from Pension Annuity (RA Distributions and Railroad Retirement Tier 2 (Not including "seasonal veterans" disability payments or state veterans' payments):	\$0.00	\$1,000.00
7. Interest and Dividend Income:	\$0.00	\$650.00
8. Loss or Gain on Sale or Exchange of Property:	\$0.00	\$0.00
9. Net Rental Income or Loss:	\$0.00	\$0.00
10. Net Business Income or Loss:	\$0.00	\$0.00
Other Income:		\$0.00
11a. Salaries, wages, bonuses, commissions, and estate and trust income:	\$0.00	\$0.00
11b. Gambling and Lottery winnings, including PA Lottery winnings, prize winnings and the value of other prizes:	\$0.00	\$0.00
11c. Value of inheritances, alimony and spousal support:	\$0.00	\$0.00
11d. Cash public assistance/relief, Unemployment compensation and workers' compensation, except Section 300(c) benefits:	\$0.00	\$0.00
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:	\$0.00	\$0.00
11f. Gifts of cash or property totaling more than \$300, except gifts between members of a household:	\$0.00	\$0.00
11g. Miscellaneous income and annualized income amount:	\$0.00	\$0.00

31-Dec-2022
03-Nov-2023
0-000-072-959

Dauphin
Harrisburg City

Amended Applications

- No option on the form to amend
- Amend by submitting another application
- Do not submit another application just to update the direct deposit information
- You cannot amend an application via myPATH a paper application must be submitted



Benefits of Electronic Filing

- Instant confirmation
- Error reducing automatic calculators
- Mandatory file upload of supporting documents
- No issues with handwriting
- No invalid addresses
- No need to keep paper files
- Avoid delays in processing
- Ensure processing of last-minute submission
- Complete appropriate schedules
- Additional checks for direct deposit information





Paper Filing

Paper Forms



Booklets are automatically sent to previous filers

Download Forms:

revenue.pa.gov

Order Forms By Phone:

1-888-PATAXES (1-888-728-2937)

Mail To:

PA Department of Revenue
Property Tax/Rent Rebate Program
P.O. Box 280503
Harrisburg, PA 17128-0503

The background features a repeating pattern of various geometric shapes and mathematical symbols in shades of blue, grey, and white. These include hexagons, circles, plus signs, minus signs, and dotted lines. The pattern is set against a light blue background with a white border at the top and bottom, and a dark blue border on the sides.

Tips to Avoid Processing Delays

Common Reminders

- All applications must be signed
- Clear handwriting
- All lines must be completed on both pages
- Do not send original documents

PA-1000
Property Tax or Rent
Rebate Claim 05-22 (FI)
PA Department of Revenue
P.O. Box 280503
Harrisburg PA 17128-0503

2022

2205010057

OFFICIAL USE ONLY

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

START → Your Social Security Number _____ Spouse's Social Security Number _____ **If Spouse is Deceased, fill in the oval.**

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 **MM/DD/YY** _____ Spouse's Birthdate **MM/DD/YY** _____ Daytime Telephone Number _____

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, 2022, 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 2022

	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. <input type="checkbox"/>	8.	
9. Net Rental Income or Loss	9.	
10. Net Business Income or Loss	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.

Property Taxes



May Apply For

- Actual Taxes Paid
 - County
 - School District
 - City/Borough/Township



May Not Apply For

- Nuisance taxes
- Penalty and Interest

If tax bills list any names other than that of the applicant or spouse, or the following words directly follow the applicant's name on the bills, proof of ownership (deed or trust agreement) is required:

Et Vir (and husband)

Et Ux (and wife)

Et Al or Et Alia (and others)

Trust

START
→

Name as shown on PA-1000 _____ Social Security Number _____

You may make photocopies of this form as needed. If you rented at more than one address, you must submit proof for each address.

PA RENT CERTIFICATE

Your landlord must provide all the information on Lines 1 through 8. Your landlord, or your landlord's authorized agent, must sign this PA Rent Certificate. If your landlord, or your landlord's authorized agent, does not sign this PA Rent Certificate, you must complete Lines 1 through 8 and the Rental Occupancy Affidavit below. Your Rental Occupancy Affidavit must be notarized.

1. Street address of the residence for which the claimant paid rent City, State, ZIP Code	3. Rental unit is (fill in the appropriate oval): <input type="checkbox"/> Apartment in a House <input type="checkbox"/> Mobile Home Lot <input type="checkbox"/> Apartment Building <input type="checkbox"/> Nursing Home <input type="checkbox"/> Boarding Home <input type="checkbox"/> Private Home <input type="checkbox"/> Mobile Home <input type="checkbox"/> Assisted Living <input type="checkbox"/> Personal Care Home Building Name: _____ <input type="checkbox"/> Domiciliary Care <input type="checkbox"/> Foster Care <small>If Domiciliary or Foster Care or if a Boarding or Personal Care Home, you must submit a copy of your contract agreement.</small>
2. Owner's business name or landlord's name (last, first, middle initial) if an individual Landlord's Address City, State, ZIP Code Landlord's EIN (if applicable) and daytime telephone number	

YOU MUST COMPLETE ALL LINES. IF NONE, ENTER "0".

	Dollars	Cents	Explanation of Item 4.
4. What was the amount of rent per month? (Include only the amount charged for rental. Do not include security deposits or amounts paid for food, medicine, medical care or personal care.) If your rental amounts changed during the year, please explain in the space provided. 4.			
5. How much of the monthly rental amount was paid or subsidized by a governmental agency? 5.			
6. Total monthly amount of rent paid. (Subtract Line 5 from Line 4.) 6.			
7. Number of months unit was occupied by the claimant in 2022. (If less than 12 months, please explain in the space provided.) 7.			Explanation of Item 7.
8. What was the total rent paid in 2022 by the claimant? (Multiply Line 6 by Line 7.) Enter the amount here and on Line 16 of the claim form or the appropriate line(s) of Schedules D, E or F. 8.			

LANDLORD'S OATH: (Read carefully before signing)
 I certify that the information provided on this PA Rent Certificate is true, correct and complete to the best of my knowledge, information and belief. I further certify that - fill in the applicable oval(s).
 I was required to pay 2022 property taxes on the property in which the claimant resided in 2022.
 I made, or was required to make, a payment in lieu of taxes for 2022 on the property in which the claimant resided in 2022.
 The property in which the claimant resided in 2022 was tax exempt.
 Other names, excluding the spouse or minor children, appear on the lease.
 X _____ Please sign and date after printing. _____ Date MM/DD/YY
 Landlord's Signature

OCCUPANCY AFFIDAVIT

I am, or am filing on behalf of, the claimant named above. I certify that I was unable to obtain the landlord's signature on the PA Rent Certificate for the following reason(s):

Affidavit: I certify that I am, or am filing on behalf of, the claimant named above. I also affirm all the information on the above PA Rent Certificate and Occupancy Affidavit is true, correct and complete to the best of my knowledge, information and belief.
 Notarize:
 Subscribed and sworn before me this _____ day of _____, 20____
 X _____ Signature of Notary Public. Please sign after printing.
 Claimant's Signature Date MM/DD/YY



PA-1000 Rent Certificate (RC)

- All renters **must** submit a fully completed Rent Certificate for each place they rented
- If unable to obtain a signature, the following can be provided:
 - Rent Certificate along with a completed and notarized Occupancy Affidavit stating the reason the landlord's signature could not be obtained

Changes in Rent Paid Throughout the Year

- Calculate the entire rent paid during the year and divide it by the number of months they lived at the property and enter the amount on Lines #4 - #8

Or

- Complete a separate PA-1000 RC form for each period

YOU MUST COMPLETE ALL LINES. IF NONE, ENTER "0".		Dollars	Cents	Explanation of Item 4.
4. What was the amount of rent per month? (Include only the amount charged for rental. Do not include security deposits or amounts paid for food, medicine, medical care or personal care.) If your rental amounts changed during the year, please explain in the space provided. 4.				Jan - June = 300 Per Month
			350.00	July - Dec = 400 Per Month
5. How much of the monthly rental amount was paid or subsidized by a governmental agency? 5.				Total Rent = \$4200/12
6. Total monthly amount of rent paid. (Subtract Line 5 from Line 4.) 6.			350.00	Total Per Month = \$350
7. Number of months unit was occupied by the claimant in 2022. (If less than 12 months, please explain in the space provided.) 7.	12			Explanation of Item 7.
8. What was the total rent paid in 2022 by the claimant? (Multiply Line 6 by Line 7.) Enter the amount here and on Line 16 of the claim form or the appropriate line(s) of Schedules D, E or F. 8.			4,200.00	

TIP: The same method of calculation can be used for subsidies reported on Line #5

Include a Copy of the Lease

If there is insufficient evidence of a landlord tenant relationship, the applicant may be asked to provide a copy of their lease agreement

If the applicant is unable to provide a copy of a lease, they may provide a notarized statement from their landlord and a copy of a utility bill

NOTE: It is the burden of the applicant to demonstrate a true landlord/tenant relationship. Failure to do so when asked may result in a denied application.

Housing Authority

If unable to obtain a signature, they can provide a letter or statement from a housing authority that must contain the following information:

- Name and address of the applicant
- Name, address, building name, federal tax identification number and telephone number of the authority
- The amount and date of each payment
- A statement that the authority was required to pay property taxes or make payments in lieu thereof; and
- A signature of the representative of the authority



ABC HOUSING AUTHORITY
111 Main St
Somewhere, PA 77777

Date Issued	02/13/2023
Letter ID	L000000000
FEIN	**_****1234
Housing ID	1001234
Period Ending	10/26/2022

Property Tax/Rent Rebate Status Denial Notice

The Pennsylvania Department of Revenue has conducted an exempt property review of your organization.

Why you are receiving this notice

If you have any questions regarding this notice, please contact the department using the information provided.

Your tax exempt facility failed to remit payment in lieu of taxes for 2022. As a result, the residents of your facility no longer qualify for the Property Tax/Rent Rebate program and are not eligible to receive rent rebates from the department.

Property Tax/Rent Rebate Division
ra-rvbitptrrxstat@pa.gov

Payment in lieu of taxes are mandated by Section 401.51, Title 61, of the PA Code. Residents of a facility which fails to remit payment in lieu of taxes are not eligible to claim a rebate from the department.

What you need to do

Please inform the residents of your facility of their inability to receive a rebate. Any rebate claims submitted to the department will be denied.

If you wish to regain eligibility of your residents to claim rent rebates, please contact the department using the information provided.

Housing Authority Compliance

Direct Deposit

Joe & Jane Taxpayer
123 Drive Avenue
Nowhere, PA 78910

50-42
370
1234567890

Date _____

Pay To The Order Of: _____ \$ _____

_____ Dollars

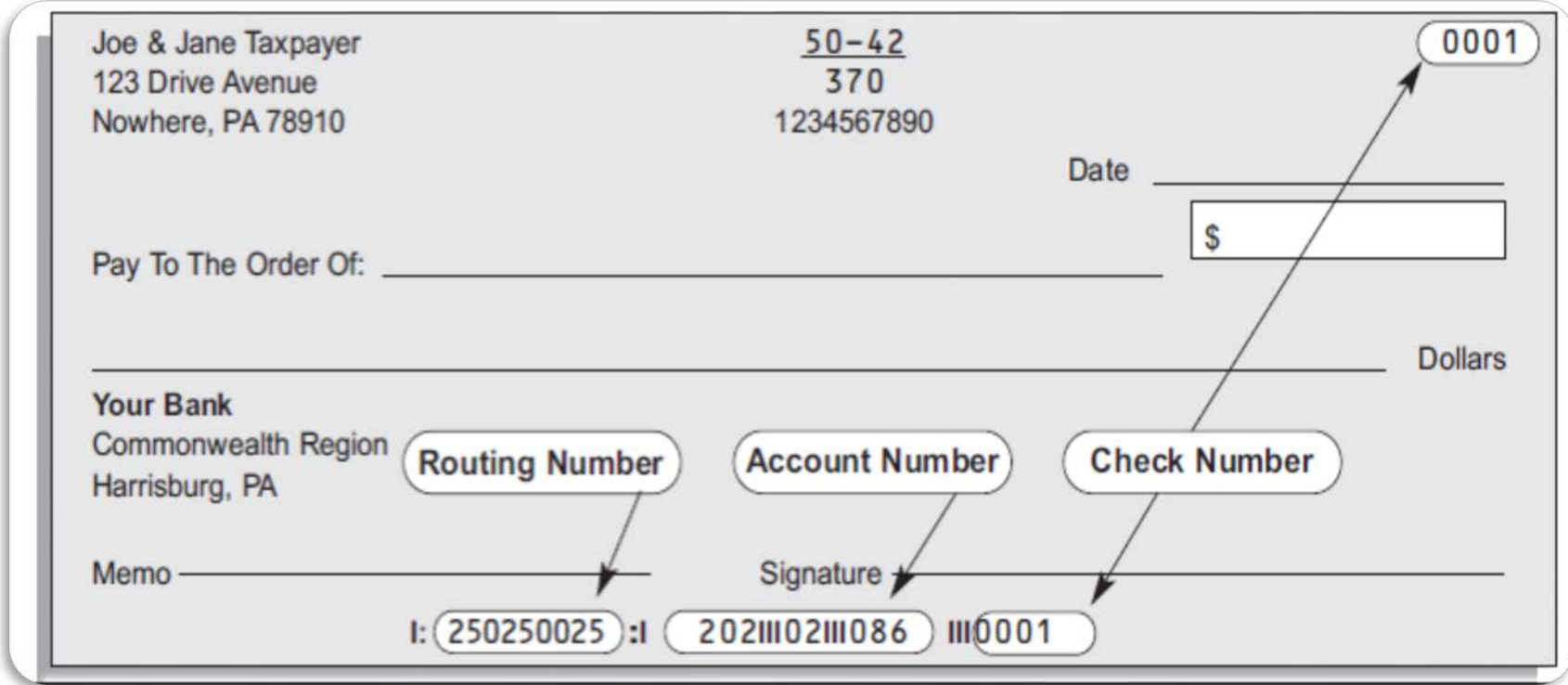
Your Bank
Commonwealth Region
Harrisburg, PA

Memo _____

Signature _____

Routing Number: 250250025
Account Number: 20211102111086
Check Number: 0001

I: 250250025 :I 20211102111086 1110001



- Faster
- Easier
- More secure

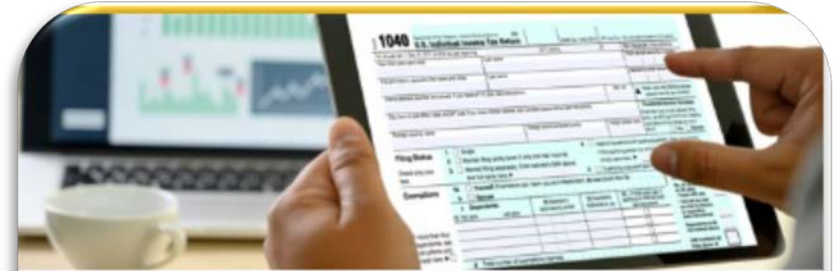
Additional Services Panel

Respond to a Letter:

- Submit documents
- Request for Information Letter ID
- Description of requested information

Find a Submission:

- Payments, returns, applications
- Email address & Confirmation Code



Additional Services

Additional myPATH services for taxpayers

- > Respond to a Letter
- > Find a Submission
- > Tax Due Dates
- > Download Forms W-2G
- > Penalty & Interest Calculator
- > Track My Inheritance Tax Return


The background features a repeating pattern of various geometric shapes including hexagons, circles, and lines in shades of blue and grey. A dark blue rectangular box with a white border is centered on the page, containing the title text. The top and bottom edges of the slide are decorated with solid blue and gold-colored bands.

Checking Rebate Status

Find Rebate Status Online

Where's My Rebate?:

- Current and previous rebate status
- Application year, date of birth, & SSN required



Rebates

View my rebate status or apply for a rebate.

- > [Apply for a Property Tax/Rent Rebate for 2021](#)
- > [Where's My Rebate?](#)

Where's My PA Property Tax/Rent Rebate?

Claim year	Date of birth *	Social Security Number *
2020	<i>Required</i>	<i>Required</i>

Search

Check Rebate Status by Phone

1-888-PA TAXES (728-2937)

- Current and previous rebate status
- Application year, date of birth, & SSN required



Automatic Updates

Automated Phone Calls

- First call when application is received
- Second call when application is approved for payment



The background features a repeating pattern of various geometric shapes and symbols, including hexagons, circles, squares, and plus signs, in shades of blue, grey, and white. The pattern is set against a light blue background with a dark blue and gold border at the top and bottom.

Status of Rebate

No Claim On File

< Home

Where's My PA Property Tax/Rent Rebate?

Claim year

2022



Date of birth

17-Mar-1950



Social Security Number

***-**-1111

The provided information does not match our records. If you filed electronically, please allow up to 24 hours from the time you submitted your application to check the status. If you mailed your application, please allow 12 to 16 weeks from the date you mailed your application to check the status.

Search

Application Received

< Home

Where's My PA Property Tax/Rent Rebate?

Claim year

2022



Date of birth

05-Jan-1957



Social Security Number

***-**-7735

We have received your Property Tax/Rent Rebate application. Please allow additional time for us to process your application. If additional information is needed you will receive a letter with instructions. Rebates are typically not issued until July 1st.

Search

Correspondence Requested

< Home

Where's My PA Property Tax/Rent Rebate?

Claim year

2022



Date of birth

20-Aug-1961



Social Security Number

***-**-1700

We have received your Property Tax/Rent Rebate application. However, additional information is required from you in order to process your application. You will receive a letter explaining what is needed and instructions for responding.

Search

Claim Processed (Approved)

< Home

Where's My PA Property Tax/Rent Rebate?

Claim year

2022



Date of birth

20-Jan-1933



Social Security Number

***-**-9175

Your Property Tax/Rent Rebate application has been processed. Your approved rebate amount is \$750.00. If you do not receive your rebate within 4 to 6 weeks from the issued date of 10/20/2023, please call 1-888-222-9190 to speak with one of our representatives.

Search

Notice of Adjustment

< Home

Where's My PA Property Tax/Rent Rebate?

Claim year

2022



Date of birth

02-Mar-1946



Social Security Number

***-**-8098

Your Property Tax/Rent Rebate application has been processed. However, we have made a change to your application or rebate. You will receive a letter explaining the adjustment(s). Please follow the instructions on your letter.

Search

Claim Denied

< Home

Where's My PA Property Tax/Rent Rebate?

Claim year

2022



Date of birth

04-Dec-1947



Social Security Number

***-**-2049

Your Property Tax/Rent Rebate application has been denied. Please refer to your notice for an explanation of the denial of your application, or you may dial 1-888-222-9190 to speak with one of our representatives.

Search

The background features a repeating pattern of various geometric shapes and symbols in shades of blue, grey, and white. These include hexagons, circles, plus signs, minus signs, and dotted lines. The pattern is set against a light blue background with dark blue and gold accents at the top and bottom edges.

Denied Applications



Jane Smith
111 Main St
Somewhere, PA 77777

Date Issued 01/04/2022
Letter ID L000000000
Social Security Number ***-**-1111
Account ID 1111111111
Period Ending 12/31/2021

Adjustment Summary

The Pennsylvania Department of Revenue has adjusted your 2021 Property Tax/Rent Rebate.

Why you are receiving this notice

If you have questions regarding this notice, please contact the department using the information provided.

- You do not qualify for a Pennsylvania Property Tax/Rent Rebate for the claim year above. The department did not receive all of the necessary information or documentation to complete your claim for a Property Tax/Rent Rebate.

Customer Experience Center
1-888-222-9190

Summary

Line Item	Reported Values	Adjusted Values
Social Security, SSI and SSP Income	\$391.00	\$4,830.60
Total Income	\$413.00	\$4,852.60
Rebate Amount	\$0.00	\$650.00

How to file an appeal

If you disagree with this decision, you may file an appeal within 90 days of the Date Issued printed on this notice. Information on filing an appeal is available at boardofappeals.state.pa.us.

Petition BOA

eservices.revenue.pa.gov/FileAnAppeal

- Register for an account
- Applicant has 90 days to appeal
- BOA has 6 months to process a petition

The background features a repeating pattern of various geometric shapes and symbols in shades of blue, grey, and white. These include hexagons, circles, squares, and plus signs, some solid and some outlined. The pattern is set against a light blue background with a white border around the central text box. The top and bottom edges of the slide have a dark blue header and footer, respectively, with a gold-colored wavy border at the very top and bottom.

Resources

Informational Flyers

REV-573



PENNSYLVANIA DEPARTMENT OF REVENUE

PROPERTY TAX/RENT REBATE PROGRAM

Expanded Income Eligibility and Larger Rebates Now Available

REV-573 11-23

i Governor Josh Shapiro delivered on a promise he made to older Pennsylvanians when he signed a new law, Act 7 of 2023, that significantly expands the Property Tax/Rent Rebate (PTRR) program. This historic legislation delivers the largest targeted tax cut for Pennsylvania seniors in nearly two decades. Under the expansion, nearly 175,000 more Pennsylvanians will qualify for a property tax or rent rebate. At the same time, many of the 430,000 people who will see their rebates increase.

Since its inception in 1971, the PTRR program has delivered **more than \$6 billion** in property tax and rent relief to some of Pennsylvania's most vulnerable residents. The program is funded by the Pennsylvania Lottery.

For more information, about the Property Tax/Rent Rebate Program, please visit revenue.pa.gov/PTRR or call 1-888-222-9190.

WHAT'S NEW

- First, the maximum standard rebate is increasing from \$650 to \$1,000.
- Second, the income cap for both renters and homeowners will be made equal and increase to \$45,000 a year.
- Third, the income caps will be tied to the cost-of-living moving forward, meaning those who receive a rebate won't lose their eligibility in the future due to increases in Social Security payments.

ELIGIBILITY REQUIREMENTS

- ✓ Pennsylvanians age 65 and older
- ✓ Widows and widowers age 50 and older
- ✓ People with disabilities age 18 and older

i You must have owned and occupied a home or rented and occupied a home, apartment, nursing home, boarding home, or similar residence in Pennsylvania.

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 & REBATES

HOMEOWNERS	RENTERS	INCOME	MAX. REBATE
🏠	🏠	\$ 0 to \$ 8,000	\$1,000
		\$ 8,001 to \$ 15,000	\$ 770
		\$15,001 to \$ 18,000	\$ 480
		\$ 18,001 to \$ 45,000	\$ 380

Exclude half of Social Security benefits, Supplemental Security income, and/or Tier 1 Railroad Retirement benefits when calculating total household income.

Rebates are based on property taxes or rent paid the year prior. 📅

HOW TO APPLY

Online: File for a rebate using myPATH at mypath.pa.gov. This is the department's user-friendly online filing system. Filing online gives you instant confirmation that a claim has been successfully filed, allows access to automatic calculators, and includes other helpful features.

Paper: If you filed for a rebate by paper last year, you will automatically be mailed a paper instruction booklet/application form. Paper applications are also available online at revenue.pa.gov/ptrr or by calling 1-800-362-2050.

Rebates will be distributed beginning July 1, as required by law. First-time filers should anticipate that it will take additional time to review their applications and process their rebates. 📅

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DPO-87



myPATH

APPLY FOR A PROPERTY TAX/RENT REBATE ONLINE WITH myPATH

DPO-87 11-23



PENNSYLVANIA TAX HUB

i Pennsylvanians can visit mypath.pa.gov to file Property Tax/Rent Rebate applications. Applicants will be asked to provide specific information on income received and property taxes or rent paid.

Benefits of filing electronically using myPATH include:

- » Fast processing and direct deposit
- » Error-reducing automatic calculators
- » Security features to safeguard sensitive information
- » User-friendly features not available when filing by paper
- » The "Where's My Rebate?" system to track the status of a claim online



It's free to apply for a rebate and assistance is available at hundreds of locations across the state, including Department of Revenue district offices, local Area Agencies on Aging, senior centers, and state legislators' offices. Applicants are encouraged to call ahead to confirm whether an appointment is required.

Applicants who wish to file by paper may obtain Property Tax/Rent Rebate claim forms (PA-1000) and related information at revenue.pa.gov/ptrr or by calling 1-800-362-2050.

Applicants must apply every year because rebates are based on annual income and property taxes or rent paid during the prior year. Applicants need to include all of the required documentation for the claim year when filing. This information is needed whether filing online or by paper.

!

Visit mypath.pa.gov to access the Department of Revenue's online filing system.



i ONLINE CUSTOMER SERVICE CENTER
revenue.pa.gov/help

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

Proof Document Checklist



PTRR Proof Document Checklist

First Time Filer:

- Were you or your spouse 65 years or older on December 31 of the application 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 application 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 application 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 disability)
 *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.
- Are you completing an application for Property Tax/Rent Rebate due a decedent? **Y N**
 If yes, you must submit a completed DEV-41

NOTE: To determine if a deceased individual is eligible for a rebate, the application must also include an annualized income amount in the calculation of total household income. See Schedule G, specifically the instructions for Line 11g, for information on the calculation of annualized income to be included in household income.

A copy of the death certificate must also be included with the application.

Acceptable Proof of Age:

- Birth Certificate
- Blue Cross or Blue Shield 63 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.

2024-01



PTRR Proof Document Checklist

Rebate Type:

- Were you a property owner the entire application year? **Y N**
 If yes, you must submit proof of real estate taxes paid (see table below for acceptable proof of taxes paid).
- Were you a renter the entire application year? **Y N**
 If yes, you must submit PA-1000 Schedule RC (see table below for acceptable proof of rent paid).
- Were you an owner/renter during the application year? **Y N**
 If yes, you must submit proof of both real estate taxes and a completed PA-1000 Schedule RC.

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

Acceptable Proof of Rent Paid:

A renter must submit a fully completed PA-1000 RC, Rent Certificate, filled out by the landlord(s), for each place they rented during the year. The landlord or their authorized agent should complete Lines 1 through 8 and complete the Landlord's Oath.

If the renter cannot get their landlord complete the Landlord's Oath, a completed PA Rent Certificate along with the notarized Occupancy Affidavit must be included.

Alternatively, they can submit a completed PA Rent Certificate along with copies of their rent receipts for each period in which they paid the rent. However, the receipts must include the landlord's or agent's signature, the full amount of rent paid, the applicant's name, and the complete address of the rental property. Rent receipts will not be accepted on their own.

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.
- If there are multiple owners listed on the tax bills (other than the spouse or minor child). You will need to complete a PA-1000 Schedule F.

IMPORTANT: Required documents must be submitted with the application. If you are filing electronically myPATH will accept the following file types: pdf, jpeg, jpg, png, gif, and tiff. If your documents are not able to be electronically uploaded, you will have to file a paper application.



File online with ease-
Scan here to learn how!

2024-01



PTRR Proof Document 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 application.

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

- Social Security, SSI, and/or SSP **Y N**
 If yes and you are using a PA address, you are not required to submit proof of this income
 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**
 If yes, you must submit a copy of your RRB-1099
- Pension, an Annuity, or an IRA Distribution **Y N**
 If yes, you must submit a copy of your 1099-R
- Railroad Retirement Tier 2 benefits **Y N**
 If yes, you must submit a copy of your RRB-1099
- Interest income **Y N**
 If yes, you must submit a copy of your 1099-INT or a copy of your PA-40
- Dividend income **Y N**
 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**
 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**
 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**
 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**
 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**
 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**
 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**
 If yes, you must submit proof of the income received
- Cash Public Assistance during the entire application year? **Y N**
 If yes, you are not eligible to claim a rebate
- Cash Public Assistance during part of the application year? **Y N**
 If yes, you must submit copies of your Department of Human Services cash assistance statements
- Unemployment compensation **Y N**
 If yes, you must submit a copy of your UC-1099-G
- Workers' compensation **Y N**
 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**
 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**
 If yes, you must submit a copy of your 1099-R and you should report the amount listed in the PA-1000 instruction booklet.

IMPORTANT: If the customer does not have supporting documentation to verify income received, an explanation should be submitted with the application.

2024-01

PTRR Quick Tips



2023 PTRR QUICK TIPS

TYPE OF FILER

Applicants of the Property Tax/Rent Rebate program must fall under one of the following four categories in order to qualify:

- Age 65 or older as of December 31st of application year
- Spouse age 65, who lived with applicant (encourage to file under the individual who is 65 or older as primary applicant)
- Widow or widower during all or part of application year and were 30 or older as of December 31st of application year; or
- Permanently and totally (100%) disabled during all or part of the year, and
 - age 18 or older during all or part of application year;
 - unable to work because of medically determined physical or mental disability; and
 - disability is expected to continue indefinitely.

Receipt of Supplemental Security Income (SSI) payments are eligible for a rebate if they meet all other requirements.

ELIGIBLE INCOME LEVELS

An applicant who meets any of the category requirements needs to also meet income eligibility requirements. Below are the income brackets based on whether the applicant is a property owner or renter and the maximum rebate amount for that income level.

ELIGIBILITY TABLE	
INCOME	MAX REBATE
\$0 - \$8,000	\$ 1,000
\$8,001 - \$15,000	\$ 770
\$15,001 - \$18,000	\$ 460
\$18,001 - \$30,000	\$ 380

PTRR CALENDAR OF EVENTS

- January – applicants may start filing out applications
- April – Posting/Processing begins. Automated calls to notify applicants that applications were received.
- June – Automated calls to notify applicants that applications were approved. 6/30 is deadline (beginning of June the Governor decides whether to extend until 12/31)
- July 1st – is the first day PA Treasury will make rebates available via direct deposits or checks
- December 31st – extension filing due date

IMPORTANT: If deadline is missed, application will not be accepted.

PAPER FILING

Any person who filed a Property Tax/Rent Rebate application for the previous tax year and was approved will automatically receive a PTRR Booklet in the mail from Department of Revenue. This mailing also includes an address label that will help speed up the processing of their application (Only use the label if all the information is still correct). When you are speaking to an applicant, please remind them to bring the booklet they received, if they are looking for help completing forms, etc.

If an applicant does not have a copy of the PTRR Booklet, please use the forms on our website at revenue.pa.gov. They are in a fillable PDF format that are easy for our equipment to scan, which will help speed up processing.

PTRR FORMS GUIDE

- PA-1000** – PTRR application form
- PA-1000 RC** – Rent Certificate and Rental Occupancy Affidavit
- PA-1000 Schedule A** – Used if applicant owned more than one home during the application year
- PA-1000 Schedule B/D/E**
 - B – Used if applicant was a widow or widower age 30 to 64 and remarried during the application year
 - D – Used when renter receives cash public assistance
 - E – Used when part of the homestead was for purposes other than residence such as an in-home business

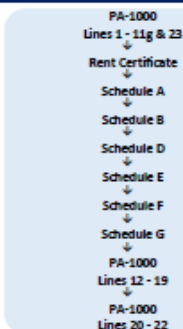
PA-1000 Schedule F/G

- F – Used to prorate taxes or rent when more than one eligible person is on the deed or lease
- G – Used to annualize income of deceased applicants

PA-1000 PS – Physician's Statement of Permanent and Total Disability

DEX-61 – Application for Property Tax/Rent Rebate due the Decedent

ORDER OF FORMS COMPLETION FOR DETERMINING PTRR REBATE



ELECTRONIC FILING

We strongly encourage Pennsylvanians to visit myPATH.pa.gov to file their Property Tax/Rent Rebate Program applications. Applicants will be asked to provide specific information on their income and rent/property taxes. Applicants should check the



2023 PTRR QUICK TIPS

Property Tax/Rent Rebate Program instruction booklet to learn which information they will need to input/upload to complete the process.

For assistance filing electronically, watch our Revenue 411 video (<https://www.youtube.com/watch?v=3p-UmJCNpXM>).

IMPORTANT: Using the electronic filing option offers many benefits, including:

- Fast processing and direct deposit options
- The "Where's My Rebate?" system to track the status of a application online
- Error-reducing automatic calculators
- Security features to ensure your sensitive information is safe
- User-friendly features that are not available when filing a paper application

WHAT ADDITIONAL INFORMATION IS NEEDED?

If you are unsure of what additional information to include, use your checklist which will tell you what type of proof documentation may be needed depending on the type of income is being reported.

If the applicant is a first-time filer, some common items that will need included are:

- Proof of age
- Proof of widow/widower – proof of age in addition to death certificate
- Proof of disability and proof of age for 1st time filer

REMINDER: Do not send originals of supporting documentation as they cannot be returned.

I RECEIVED A NOTICE

If it is determined that additional information is needed, the department will send a request for information notice to the applicant. We encourage that information in response to these notices be submitted electronically via myPATH.

Applicants will need to go to *Respond to a Letter* under the *Additional Services panel* and enter the letter ID and their social security number. This is the fastest and most efficient way to interact with the department. Once the information has been submitted, a confirmation number will be provided to the applicant. If applicants are unable to submit electronically, they may still fax or email the responses to us using the following information:

- Fax Number: 717-787-1834
- Email: RA-RVBITPTRRFAX@pa.gov

Documents submitted electronically or via email must be converted to the following formats to be able to be uploaded:
PDF, .jpg, .png, .gif, .tiff, .rtf

CHECKING THE REBATE STATUS

Applicants can check the status of their application online or over the phone. They will need the primary applicant's SSN, date of birth and application year when checking the status.

Online:
myPATH.pa.gov > Where's My PA Property Tax/Rent Rebate?

Automated phone #: 1-888-PATAVEX (728-2937)
Available 24 hours a day 7 days a week

NOTE: If they input incorrect information, it will lock them out for 24 hours, advise them to try again the following day

CHECK THE STATUS OF A SUBMISSION

If an applicant wants to check on a submission, they can now do so online. After successfully submitting their application on myPATH, a confirmation email will be sent with a confirmation code.

Applicants will need to go to *Find A Submission* under the *Additional Services panel* and enter in the email used and the confirmation code received. This feature allows applicants to confirm that an application has been successfully submitted. Applicants can delete the submission within 24 hours or print a copy of the application from the *Find A Submission* option.

If an applicant calls either the Customer Experience Center or automated phone line, we will not be able to provide a status on a submission until it is posted in our system.

NOTE: The Find a Submission option cannot be used to check the status of a response to a notice submitted through the Respond to a Letter feature.

SUPPLEMENTAL REBATES (KICKERS)

Supplemental rebates are automatically calculated for property owners with \$30,000 or less in income that live in:

- Philadelphia, Scranton, or Pittsburgh
- Taxes are 1.5% or more of total income

Income	Standard Rebate	Supplement (Kicker)	Total Max Rebate
\$0-\$8,000	\$1,000	\$500	\$1,500
\$8,001-\$15,000	\$770	\$385	\$1,155
\$15,001-\$18,000	\$460	\$230	\$690
\$18,001-\$30,000	\$380	\$190	\$570

PTRR RESOURCES

- Department of Revenue Website revenue.pa.gov
- PTRR Check List
- [Online Customer Service Center \(FAQ's\)](http://myPATH.pa.gov)
- [PA-1000 Instructions](http://myPATH.pa.gov) (or other forms/Instructions online)
- [Property Tax/Rent Rebate Preparation Guide \(DFO-3\)](http://myPATH.pa.gov)
- Customer Experience Center: 888-222-9190
- Monday – Friday, 8 A.M. to 5 P.M.

myPATH Assistance



myPATH CHAT on homepage



myPATH@pa.gov




717-425-2495 ext. PATH1



revenue.pa.gov/mypathinformation


Support ID


PA An Official Pennsylvania Government Website


 Pennsylvania Department of Revenue

Important: Did you know there are a number of things you can do on myPATH that do not require you to sign up for a username or password? That includes filing an application for a rebate of property taxes or rent paid in 2020. Follow Property Tax/Rent Rebate for 2020.

WARNING! BY ACCESSING AND USING THIS GOVERNMENT COMPUTER SYSTEM, YOU ARE CONSENTING TO SYSTEM MONITORING FOR LAW ENFORCEMENT AND OTHER PURPOSES. UNAUTHORIZED USE OF, OR ACCESS TO, THIS COMPUTER SYSTEM MAY SUBJECT YOU TO CRIMINAL PROSECUTION AND PENALTIES.


 **PENNSYLVANIA TAX HUB**

Username
Password 
Log in

 ?

- Support
- Open the Assistant
- Help
- View Support ID**


Get Support ID

 A support ID can be given to a support person to allow them to remotely view your myPATH session.

Do you want to get a support ID and allow a support person to view your session to provide assistance?

No **Yes**

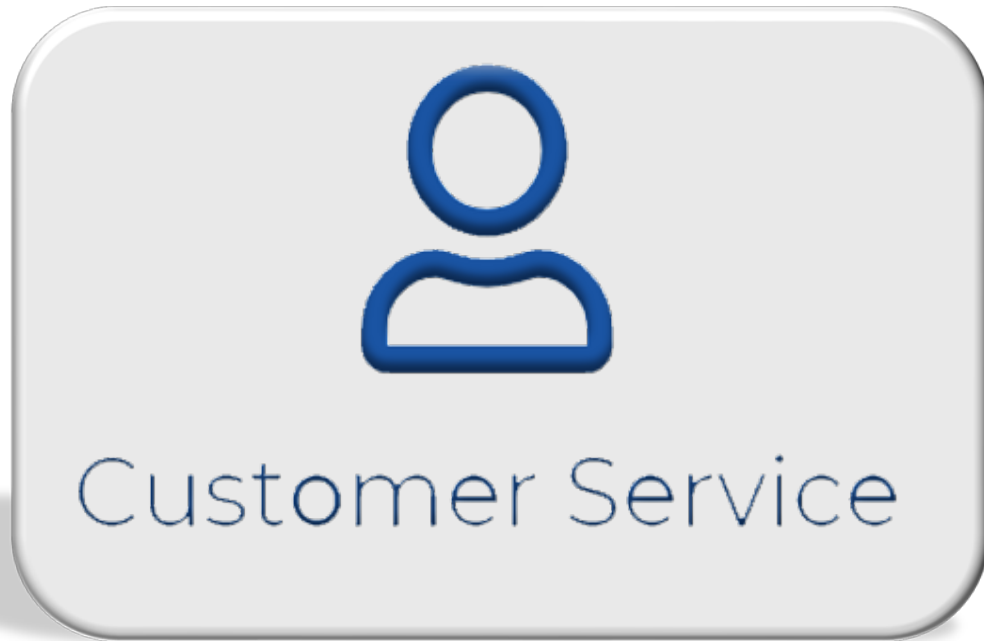
Your Support ID

 Your support ID is: 277489.

This can be given to a support person to allow them to view your myPATH session.

OK

Online Customer Service Center



FAQ's

- Answers to common tax questions
- Related links to forms and tax guides

Submit A Question

- Receive a response within 72 business hours

Office of Legislative Affairs

- 717-787-1007
- Revlegis@pa.gov

Office of Legislative Affairs Webpage

www.revenue.pa.gov/GetAssistance/LegislativeAffairs

[Pennsylvania Department of Revenue](#) > [Get Assistance](#) > Office of Legislative Affairs

Office of Legislative Affairs

This webpage is for members and staff of the General Assembly to assist with constituent inquiries.

The Department of Revenue, Office of Legislative affairs, serves as a liaison for the State Legislature and the Governor's Office. This includes maintaining a presence at committee meetings held by the House and Senate and working directly with members and staff on legislation related to Revenue matters. The office is also responsible for advocating legislation on behalf of the Governor and the Department and tracking proposals introduced by the General Assembly to determine the overall impact.

In addition, this office deals with House and Senate members on a daily basis by answering questions regarding state tax issues, rules and regulations, and department operations.

[PTRR Resources](#)

[myPATH Information](#)

[Waiver of Confidentiality \[PDF\]](#)

[Legislative Inquiries Submission Update...](#)

Links to:

- [PTRR resources](#)
- [myPATH Information](#)
- [Waiver of Confidentiality](#)

Submitting Inquiries

Beginning October 24, 2023, legislative inquiries will be processed through a new secure email response system:

- Email address used for submissions (revlegis@pa.gov) will remain the same
- Viewing the responses to those submissions will look slightly different
- Expedite the response time
- Provide better tracking of inquiries
- Eliminate the need for multiple contacts.

Questions?

