



Pocono Mountain School District

Property Tax Rebate Program

2007 Property Taxes

Pocono Mountain School District Property Tax Rebate Program

Program Highlights For Filing 2007 Claims

- Submit Form TRCF-1000 to apply for filing property tax rebate claims.
- The **claimant does not calculate** the amount of the school property tax rebate.
- **Pocono Mountain School District will calculate** the amount of the school property tax rebate.
- The **claimant is no longer required to submit copies of documentation** substantiating the claimant's and/or spouse's income. **However, copies of documents supporting a claimant's and or spouse's income will be required if a rebate claim is selected for audit purposes.**
- A Question & Answer Guide for filing 2007 claims is available.

Did you remember to do the following?

- Sign & date the rebate Form TRCF-1000?
- Attach a **signed** copy of your **PA-1000**?
- Attach a copy of your receipted school tax bill?
- Attach proof of age, disability or death when applicable?

**Pocono Mountain School District
Property Tax Rebate Program**

Filing Packet

For Filing 2007 Claims

This packet is to be used for filing 2007 school property tax rebate claims. This packet includes the following:

- **Program Highlights**
- **Form TRCF-1000**
- **Question & Answer Guide**



Please Print or Type the Information Below. This Form Must Be Filed By December 31, 2008.

PART I - CLAIMANT INFORMATION

Claimant's Name

Spouse's Name

Claimant's Social Security Number

Spouse's Social Security Number

Street Number, P.O. Box; Apartment Number, Suite; RR Number, etc.

City, State & ZIP Code

Claimant's Date of Birth

Spouse's Date of Birth

Daytime Telephone Number

Township or Borough Name

PART II - FILING STATUS

1. I certify that I am: (Check One Box Only)

- A. A Claimant, age 65 or older as of December 31, 2007.
- B. A Claimant under age 65 with a spouse age 65 or older as of December 31, 2007.
- C. A Widow or Widower, age 50 to 64 as of December 31, 2007.
- D. Permanently Disabled, age 18 to 64 during 2007.

2. Did you receive a property tax rebate last year ? (Check Appropriate Box)

- A. YES Proceed to PART III.
- B. NO Provide the following documentation when filing your form:
 If Question 1, **Box A or B** is checked, provide proof of age.
 If Question 1, **Box C** is checked, provide proof of age & proof of spouse's death.
 If Question 1, **Box D** is checked, provide proof of age & proof of disability.
 Proceed to PART III.

PART III - SIGN & DATE

CLAIMANT: I declare that this claim is true, correct and complete and to the best of my knowledge and belief, and this is the only claim filed by members of my household.

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

Claimant's Signature & Date

Preparer's Signature, Date & Phone Number

A signed copy of Form PA-1000 and a copy of your receipted school property tax bill must be attached to this form in order to be eligible to receive a property tax rebate.

Pocono Mountain School District Property Tax Rebate Program

Question & Answer Guide

For Filing 2007 Claims

Q ■ Who can file for a Property Tax Rebate claim?

A. The Property Tax Rebate is based on the 2007 property taxes paid during the year 2007 calendar year, or paid in the 2007 claim year. To file for a Property Tax Rebate:

- You must have ***owned and occupied a residence*** within Pocono Mountain School District during 2007; and

You or your spouse must have been at least 65 years old as of December 31, 2007.

or

You were a widow or widower during all or part of 2007 and must have been 50 years or older as of December 31, 2007.

or

You were permanently disabled during all or part of 2007, 18 years or older during 2007, and were unable to work because of a medically determined physical or mental disability.

- Your total 2007 household income, including your spouse's, must have been **\$ 35,000 or less**. *Note: Fifty percent (50%) of social security/railroad retirement income shall be excluded in determining eligibility income limits*
- You or someone on your behalf must have paid the school taxes on the residence for 2007. The payment must have been made on or before the date of filing the claim.
- Only one member of each household may file a claim even if more than one person is qualified to receive a rebate.

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

A. You **may file a claim** for an eligible claimant who **died after December 31, 2007**. If the claimant **died during 2007, you may not file a claim**. The law governing the Property Tax Rebate Program requires that a claimant must have lived for all of 2007 in order to receive a rebate.

If you are filing a claim for an eligible decedent, please include "Estate of" before the claimant's name. Also, you must include with the other required proof documents a copy of Letters of Administration or the short certificate.

Q. What did I need to submit if I am a widow or widower?

A. If you are claiming eligibility because you were a widow or widower and 50 years of age or older, you must provide proof of your spouse's death and proof of age if this is the first year you are filing a rebate.

Q. What do I need to attach to my form to claim a property tax rebate?

A. You will need to produce a copy of your receipted school tax bill for the year being claimed. Canceled checks are not acceptable. If your name does not appear on the tax bill, proof of ownership must be submitted. For example, a copy of deed or a copy of the trust, will, or decree of distribution if the property was inherited. If the address is not on the receipted bill or mortgage statement, a letter from your tax collector or mortgage company verifying your home address must also be submitted.

You also must submit a signed copy of Form PA-1000 "Property Tax or Rent Rebate Program" as submitted to the Pennsylvania Department of Revenue.

Copies of Forms W-2, 1099-INT, 1099-DIV, 1099-R, 1099-MISC, SSA-1099 or copies of your federal income tax return or your PA tax return for the claim year are not required when filing your claim form. However, copies of these forms may be required to be submitted to substantiate your income if your return is selected for audit purposes.

If you have not filed a rebate previously with the District, **you must** submit proof of age.

Q. What documents can I use as proof of age?

A. The District will accept: a birth certificate; Blue Cross 65 Special Card; a valid driver's license; church baptismal record; hospital birth record; Social Security Administration document which clearly shows your age; naturalization papers if your age is shown; military discharge paper if your age is shown; Medicare card; or passport. Photocopies are acceptable. **Do not send original documents.**

Q. What do I need to submit for proof of disability?

A. The District will accept: photocopies of a Medicare card, Social Security Administration Award letter, Veteran's Administration Award letter indicating 100% disability, or a detailed medical report from your physician which outlines your disability.

Q. What is the total amount I can be eligible to receive as a rebate?

A. The total amount that you may be eligible to receive as a rebate is **\$650**.

Q. If I am eligible, how do I obtain my tax rebate?

A. All eligible taxpayers must file a Tax Rebate Claim Form (**TRCF-1000**) with the District and include a signed copy of the PA-1000, copy of a receipted school tax bill, and proof of age, death or disability when applicable. Tax Rebate Claim Form must be signed and dated and sent in by the appropriate deadline to be eligible to receive a rebate.

Q. When do I file my tax rebate claim form? Is there a deadline?

A. Tax Rebate Claim Form (**TRCF-1000**) must be filed between January 1, 2008 and December 31, 2008. **No Tax Rebate Claim Forms will be accepted after December 31, 2008 for 2007 rebate claims.**

Q. Where do I send my tax rebate claim form?

A. Tax Rebate Claim Form (**TRCF-1000**) can be mailed to the following address:
Pocono Mountain School District
P.O. Box 200
Swiftwater, PA 18370-0200
Attention: Joseph Matz

Q. Are there any penalties for fraudulent claims to obtain a tax rebate?

A. In any case in which a Tax Rebate Claim Form (**TRCF-1000**) is excessive and was filed with fraudulent intent, the claim shall be disallowed in full and a penalty of twenty-five (25%) of the entire amount claimed shall be imposed. The penalty and the amount of the disallowed claim, if the claim has already been paid, shall bear interest at the rate of one-half (1/2) of one-percent (1%) per month from the date of the claim until repaid. The claimant and any person who assisted in the preparation and or filing of a fraudulent claim shall be guilty of a misdemeanor, and upon conviction thereof, shall be sentenced to **pay a fine not exceeding one thousand dollars (\$1,000)**, or undergo imprisonment not exceeding one year, or both. A claim shall be disallowed if the claimant received title to the residence primarily for the purpose of receiving a property tax rebate claim.

Q. If I have any questions, is there someone I can contact?

A. If you have any questions, you can call the Accounting Department at (570) 839-7121 Extension 60346 between the hours of 8:30 a.m. and 4:00 p.m.

Q. Where can I get a Rebate Form (TCRF-1000)?

A. You can obtain the forms at the Administration Building located on the Swiftwater Campus or access our website at pmsd.org, click on community link then tax rebate program.

Q. Did you remember to file your Pennsylvania State Property Tax Rebate?

A. You may be eligible to file a Property Tax Rebate with the Pennsylvania Department of Revenue. The guidelines for the Pennsylvania State Property Tax Rebate Program (form PA-1000) has changed. **The Pocono Mountain School District property tax rebate program (form TRCF – 1000) requirements will remain the same as last year.** To obtain this rebate, an applicant must file Form PA-1000 – “Pennsylvania Property Tax or Rent Rebate Program”. **A signed copy of this form is required to be filed with your Pocono Mountain School District Rebate Application (TCRF-1000).** You may obtain Form PA-1000 by calling (800) 362-2050 or by visiting the Pennsylvania Department of Revenue’s web site atwww.revenue.state.pa.us. In addition, you may request Form PA-1000 by writing to:

Pennsylvania Department of Revenue
Tax Forms Service Unit
711 Gibson Blvd.
Harrisburg, PA 17104-3200

Income Eligibility

TOTAL INCOME	Rebate Amount
\$0 to \$8,000	\$650
\$8,001 to \$15,000	\$500
\$15,001 to \$18,000	\$300
\$18,001 to \$ 35,000	\$250
\$35,001 or over	NOT ELIGIBLE