

# Pocono Mountain School District Property Tax Rebate Program

## Question & Answer Guide

### For Filing 2016 Claims

**\* Rebates will be processed beginning JULY 2017\***

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

**A.** The Property Tax Rebate is based on the 2016 School property taxes paid during the 2016 calendar year, or paid in the 2016 claim year. To file for a Property Tax Rebate:

- You must have ***owned and occupied a home as your primary residence*** within Pocono Mountain School District during 2016; and

You or your spouse must have been at least 65 years old as of December 31, 2016.

or

You were a widow or widower during all or part of 2016 and must have been 50 years or older as of December 31, 2016.

or

You were permanently disabled during all or part of 2016, 18 years or older during 2016, and were unable to work because of a permanent medically determined physical or mental disability.

- Your total 2016 **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 **in full** on the residence for 2016 by **December 31, 2016**.
- 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.** If the claimant **died during 2016, you may not file a claim.** If the claimant died after December 31, 2016, a claim may be filed for the eligible decedent. Please include “Estate of” before the claimant’s name. Also, you must include, along with the other required proof documents, a death certificate and a copy of Letters of Administration or a Short Certificate.

**Q.** What do 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 a death certificate for your spouse and proof of your age.

**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.

Note: If your tax bills include a name and/or names other than yours and your spouse, you must complete and attach a copy of PA-1000 Schedule F or submit proof that you are the sole owner of the property.

***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 Social Security Administration Award letter stating total disability, Veterans Administration Award letter indicating 100% disabled, or a Civil Service letter indicating 100% disabled. If you do not qualify under any of these previous programs you must submit a Physician's Statement of Permanent Disability (PA-1000 PS). This form can be found in your PA-1000 instruction booklet provided to you from the PA Department of Revenue. Note: the Physician's Statement of Permanent Disability cannot be used if you were denied Social Security disability benefits.

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

**A.** For the tax year 2016-2017, Pocono Mountain School District has enhanced the Property Tax Rebate Program by doubling the amount that you may be eligible to receive as a rebate. The maximum amount is **\$1,300**. The school rebate is calculated on **school property taxes only**.

Example: You are eligible for the standard rebate of \$650 and the enhanced rebate would amount to \$1,300. Your school tax paid was \$1,500 and you received a Pennsylvania property tax rebate of \$650. The school enhanced rebate would be reduced to \$850.

School property tax bill paid in 2016	\$ 1,500
PA Property Tax rebate received	<u>- 650</u>
PMSD School Tax rebate due	\$ 850

**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. Include the following documents:

- **A signed copy of the PA-1000**
- **A receipted school tax bill**
- **Proof of age, death or disability**

The TRCF-1000 must be signed, 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, 2017 and December 31, 2017. Tax Rebate Claim Forms will not be accepted after December 31, 2017 for 2016 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: Property Tax Rebates

**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 Lindsey Cundiff at (570) 839-7121 extension 10158 between the hours of 8:30 a.m. and 4:30 p.m., Monday through Friday.

**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 [www.pmsd.org](http://www.pmsd.org) under Helpful Links > Property Tax Rebate Info.

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

**A.** 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 submitted with your Pocono Mountain School District Rebate Application (TCRF-1000).** You may obtain Form PA-1000 by calling (888) 222-9190 or by visiting the Pennsylvania Department of Revenue’s website at [www.revenue.pa.gov](http://www.revenue.pa.gov). You may also request Form PA-1000 by writing to:

Pennsylvania Department of Revenue  
Tax Forms Service Unit  
1854 Brookwood Street  
Harrisburg, PA 17104-2244