Pennsylvania
Department of Revenue

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 your completing an application for Property Tax/Rent Rebate due a decedent? **Y N**

- ☐ If yes, you must submit a completed DEX-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 65 Special Card
- Church Baptismal Record
- Driver's License of PA Identification Card
- Hospital Birth Record
- Naturalization/Immigration Paper (if age shown)
- Military Discharge Paper (if age shown)
- Medicare Card
- PACE/PACENET Card
- Passport

Acceptable Proof of Permanent Disability:

- For Social Security disability, SSI permanent and total disability, Railroad Retirement permanent and total disability, or Black Lung disability, provide a copy of your award letter.
- For Veterans Administration disability, provide a letter from the Veterans Administration stating that you are 100 percent disabled.
- For Federal Civil Service disability, provide a letter from Civil Service stating that you are 100 percent disabled.
- If you do not qualify under any of the disability programs mentioned above, did not apply for Social Security benefits, or do not have a letter from the Veterans Administration or Civil Service Administration, you must submit a Physician's Statement of Permanent Disability (PA-1000 PS), enclosed in the PA-1000 booklet. The form must describe your disability as permanent, and your physician must sign the statement to certify that the information is true and accurate to the best of his/her knowledge and belief.

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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 a completed PA-1000 Schedule RC (see table below for acceptable proof of rent paid).
If you live in a Tax-Exempt property, you don't qualify unless the owner makes a payment in lieu of taxes.

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 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 submitted with the application. If you are filing electronically myPATH will a*ccept 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.

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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 apply for 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 on the PA-1000.

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