

Nazareth Area School District

Property Tax Rebate Program Guidelines

You must file between July 3, 2017 and April 30, 2018

The Property Tax/Rent Rebate program benefits eligible Pennsylvanians

- age 65 and older
- widows and widowers age 50 and older
- people with disabilities age 18 and older.

Before You Begin:

You must apply for and receive a PA STATE REBATE prior to applying for the school district rebate. Contact your State Representative's office for assistance.

Mr. Joseph Emrick
134 S. Main St.
Nazareth
Phone: 610-746-5090
www.repemrick.com

Ms. Marcia Hahn
196 W. Moorestown Rd.
Wind Gap
Phone: 610-746-2100
www.rephahn.com

Eligibility:

Once you receive your state rebate, you are eligible for a school district property tax rebate for claim year 2016, if you meet one requirement in EACH of the three guidelines below:

Age Guidelines:

- You were 65 or older as of Dec. 31, 2016;
- You were not 65, but your spouse who lived with you was 65 or older as of Dec. 31, 2016;
- You were a widow or widower during all or part of 2016 and were 50 or older as of Dec. 31, 2016; or
- You were permanently disabled and 18 or older during all or part of 2016, you were unable to work because of your medically determined physical or mental disability, and your disability is expected to continue indefinitely. If you received Supplemental Security Income (SSI) payments, you are eligible for a rebate if you meet all other requirements. NOTE: If you applied for Social Security disability benefits and the Social Security Administration did not rule in your favor, you are not eligible for a Property Tax Rebate as a disabled claimant.

Income Guideline:

- The income listed on line 12 of your PA 1000 (your state rebate application) must be less than \$35,000.

Property Owner Guideline:

- To file you must have owned and occupied your home on December 31, 2016;
- You paid the 2016 property taxes on your home prior to March 31, 2017

NOTE: Delinquent tax payments make you ineligible to receive a school district rebate.

The rebates are calculated according to the income guidelines below:

Household Income: (Taken from line 12 of the PA 1000)	Maximum Rebate is the lesser of: School Real Estate Taxes Paid – State Rebate = \$ -or-
\$ 0 - \$ 8,000	\$650
\$8,001 – \$15,000	\$500
\$15,001 – \$18,000	\$300
\$18,001 – \$35,000	\$250
Over \$35,000	\$ 0

NOTE: You will not receive a total rebate (state rebate + school district rebate) that exceeds the amount of the Nazareth Area School District real estate taxes paid. So if you received a \$650 rebate from the state and you paid \$1,000 in school real estate taxes, you will receive \$350 even if you qualified for a higher rebate.

To be considered for the NASD School Tax Rebate Program, please provide only the following documents:

- TRCF-1000 2017** (signed and dated by applicant)
- PAID RECEIPT for School Real Estate Tax bill for 2016-2017**
 - Stamped paid by tax collector -OR-
 - Paid receipt from tax collector -OR-
 - Copy of your cancelled check
- PA STATE FORM 2016 PA-1000 for year ending 2016**
 - Copy of the completed and signed form that was submitted to State. See your State Representative’s Office for a copy.
- Copy of your PA STATE Rebate Check dated July 2017 or later**

If you did not make a copy visit:
<https://www.doreservices.state.pa.us/Individual/RebateDefault.htm> enter the appropriate information, and print the verification page.

Direct Deposit Instructions:

In order to comply with banking rules, direct deposits are not available for rebates going to bank accounts outside the U.S. If your bank account is outside the U.S., do not complete the direct deposit information. Nazareth Area School District will send 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 Nazareth Area School District to directly deposit your rebate into your checking or savings account at your bank, credit union, or other financial institution, place an X in the appropriate box on page 2 for the TRCF 1000.

CAUTION: Be sure to enter the correct routing and account numbers. Please check with your financial institution to make sure your direct deposit will be accepted and to get the correct routing and account numbers. Nazareth Area School District is not responsible for a lost rebate if you enter the wrong account information. The Nazareth Area School District cannot change the banking information you enter. If the information you entered is not accurate or up to date, Nazareth Area School District will send a check instead of making a direct deposit into your account.

By placing an X in either box on page 2 of the TRCF 1000, you are authorizing Nazareth Area School District to directly deposit your rebate into your checking or savings account. Direct deposits cannot be made to Social Security Direct Express[®] cards.

IMPORTANT: Do not include a copy of a blank check with your rebate application. Nazareth Area School District cannot complete this information on your application.

Routing Number

- Enter your bank or financial institution's nine-digit routing number. The first two digits must be 01 through 12, or 21 through 32. Do not use spaces or special characters when entering the routing number. If you are attempting to complete this line using a deposit slip, please contact your financial institution to determine if the routing number is correct. Many times the number on the deposit slip is for internal use by the institution and using it may delay the payment of your rebate

Account Number

- Enter your checking or savings account number. Your account number may be as many as 17 digits and may contain both numbers and letters. Enter the numbers and letters from left to right.

CAUTION: If your bank has recently changed ownership, the routing and account numbers on your check may be incorrect. Please verify the routing and account numbers with your bank before you enter them

Mailing Instructions:

You must complete and submit one original claim form to Nazareth Area School District. If you need a claim form, visit www.nazarethasd.org and click on NASD Real Estate Rebate. Due to increased security measures at the school district please do not drop off your property tax rebate packet at the district office.

IMPORTANT: Do not cut any paper to smaller than 8 ½ by 11 standard letter size paper. Smaller pieces of paper are difficult to manage and may extend your rebate processing time. Photocopies your tax payment and rebate check on the same page is acceptable.

Mail to: Nazareth Area School District
ATTN: Bookkeeper
One Education Plaza
Nazareth, PA 18064

Questions: Business Office
610-759-1170 ext. 1117
Monday through Thursday
8:30 a.m. – 3:30 p.m.

Rebate Processing:

****Please allow 6-8 weeks for processing your rebate application.****

Applications received during the month are paid at the end of the following month after they are approved by the School Board. A letter will be sent to you if additional documents are required to process your application.

Deadlines:

No rebates will be processed if received by the school district after the deadline date indicated on the application.

Previous Years:

You cannot apply for a rebate for any previous years regardless of your eligibility for previous years' rebates. Nazareth Area School District makes every fiscally responsible effort possible to inform seniors of the rebate program. Lack of knowledge of the program does not entitle anyone to rebates for previous years.

Households with more than one claimant:

Only one member of your household may file a claim even if more than one person qualifies for a rebate.

Rules regarding death of someone who was eligible for the rebate:

You **may file a claim** for an eligible claimant, who **died after December 31, 2016**. If the claimant **died during 2016, you may not file a claim**. The law governing the Property Tax Rebate Program requires that a claimant must have lived for all of 2016 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.

Penalty for fraudulent claims:

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 per cent (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 filling 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.