

PART 1 – CLAIMANT INFORMATION

Claimant Name _____

Claimant Social Security # _____ Claimant Date of Birth _____

Spouse Name _____

Spouse Social Security # _____ Spouse Date of Birth _____

Address _____ City/State/Zip Code _____

Daytime Phone Number _____ Municipality of Residence _____

PART 2 – FILING STATUSI certify that I am: (Check ☒ one box only)

- ☐ A Claimant, age 65 or older as of December 31, 2023
- ☐ A Claimant, under age 65 with a Spouse age 65 or older as of December 31, 2023
- ☐ A Widow or Widower, age 50 to 64 as of December 31, 2023
- ☐ Permanently Disabled, age 18 to 64, during 2023

Table A
Income Eligibility Guidelines

Total Household Income	Maximum Rebate
\$ 0 to \$10,000	\$650
\$10,001 to \$15,000	\$500
\$15,001 to \$18,000	\$300
\$18,001 to \$35,000	\$250

PART 3 – PROPERTY TAX REBATE CALCULATION WORKSHEET

- A. Total Income of Claimant and Spouse
(Enter the amount from Line 13 of 2023 Form PA-1000) \$ _____
- B. 2023 Commonwealth of Pennsylvania Property Tax Rebate
(Enter the rebate amount received from the PA Department of Revenue) \$ _____
- C. 2023-2024 East Penn School District Property Taxes Paid
(Per taxpayers receipted school property tax bill) \$ _____

The School District will calculate the eligible rebate amount.**PART 4 – SIGN AND DATE**

CLAIMANT: I declare that this claim is true, correct, and complete and to the best of my knowledge and belief, is the only claim filed by members of my household. I acknowledge that in order to process this application and/or confirm my program eligibility, it may be necessary for the East Penn SD to transmit my social security number and/or birthdate and I hereby authorize this information to be released by East Penn SD.

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

Claimant's Signature and Date_____
Preparer's Signature, Date, and Phone Number**TO QUALIFY FOR THIS EAST PENN SCHOOL DISTRICT PROPERTY TAX REBATE PROGRAM (PTR) YOU MUST HAVE RECEIVED A REBATE FROM THE PA DEPARTMENT OF REVENUE.**

A signed copy of Form PA-1000 for 2023 (2 pages), a copy of your PA rebate check (that was received after July 1, 2024), and a copy of your receipted 2023-2024 school property tax bill paid-in-full must be attached in order for this form to be processed (see the East Penn School District PTR-1000 Instructions for additional information).

Business Office Use Only:

Amount Approved _____

Information Checked/Verified _____

Account Number 10-6111- -100

Management Approval _____

**East Penn School District
Property Tax Rebate Program Instructions**

INSTRUCTIONS

Applications for the East Penn School District Property Tax Rebate Program for 2023 must be filed between July 1, 2024 and May 30, 2025.

To be considered for the East Penn School District (EPSD) Property Tax Rebate (PTR) Program, the following documents must be provided:

- 1. East Penn School District PTR-1000 for 2023**
 - a. Parts 1, 2, and 3 must be completed in legible handwriting or typewritten
 - b. Part 4 must be signed and dated by the claimant
- 2. 2023-2024 East Penn School District Property Tax bill – PAID-IN-FULL RECEIPT**
 - a. The original tax bill stamped paid by the tax collector -or-
 - b. An alternate receipt from the tax collector showing the taxes were paid -or-
 - c. A copy of the tax bill along with a copy of your cancelled check (front and back)
- 3. PA STATE FORM PA-1000 for year ending 2023**
 - a. A copy of the completed and signed form that was submitted to the State -or-
 - b. A copy of the electronic application submitted to the State
- 4. PA STATE Rebate received July 2024 or later**
 - a. A copy of your state rebate check received from the PA Department of Revenue
 - b. If your rebate was received as a direct deposit to your bank account, you may submit a copy of your bank statement showing the direct deposit.
 - c. A copy of your rebate payment confirmation printed from the PA Department of Revenue website

FILING LOCATION AND QUESTIONS

Completed forms should be delivered to:

East Penn School District
Attn: Property Tax Rebate Program
800 Pine Street
Emmaus, PA 18049

Questions can be directed to:

East Penn SD Business Office
Call: 610-966-8300
Monday through Friday
8:00 am to 3:00 pm

PENALTY FOR FRAUDULENT CLAIMS

In any case in which a Tax Rebate Claim form (PTR-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.

**East Penn School District
Property Tax Rebate Program Instructions**

QUESTION AND ANSWER GUIDANCE

Page 1

Q. Who can file a property tax rebate claim?

- A. The Property Tax Rebate for 2023 is based on the school district property taxes paid during the 2023-2024 school year (i.e., between July 1 and December 31, 2023).

To file a Property Tax Rebate:

You must have owned and occupied a residence within the East Penn School District during the 2023-2024 school year.

You or your spouse must have been at least 65 years old as of December 31, 2023, or

You were a widow or widower during all or part of 2023 and must have been 50 years or older as of December 31, 2023, or

You were permanently disabled during all or part of 2023, 18 years or older during 2023, and were unable to work because of a medically determined physical or mental disability.

Your total calendar year 2023 household income, including your spouse's income, must have been \$35,000 or less. NOTE: Fifty percent (50%) of social security/railroad retirement income shall be excluded in determining income limits.

You or someone on your behalf must have paid in full the school district taxes on the residence for 2023-2024. The payment must have been made on or before December 31, 2023.

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, 2023; however, you may not file a claim if the claimant died during calendar year 2023. The law governing the Property Tax Rebate Program requires that a claimant must have lived for all of 2023 in order to receive a rebate.

**East Penn School District
Property Tax Rebate Program Instructions**

QUESTION AND ANSWER GUIDANCE

Page 2

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

A. You must attach the following three (3) items to your claim form:

1. **2023-2024** East Penn School District Property Tax bill – **PAID-IN-FULL RECEIPT**

- a. The original bill stamped paid by the tax collector –or–
- b. An alternate receipt from the tax collector showing the taxes were paid –or–
- c. A copy of the tax bill along with a copy of your cancelled check (front and back)

2. PA STATE FORM PA-1000 for year ending **2023**

- a. A copy of the completed and signed form that was submitted to the State
- b. A copy of the electronic application submitted to the State

3. PA STATE Rebate Check dated July 2024 or later

- a. A copy of your state rebate check received from the PA Department of Revenue
- b. If your rebate was received as a direct deposit to your bank account you may submit a copy of your bank statement showing the direct deposit.
- c. A copy of your rebate payment confirmation printed from the PA Department of Revenue website

B. What should I do if I did not make a copy of my State Rebate check or my rebate was direct deposited into my bank account?

A. If your rebate was received as a direct deposit to your bank account you may submit a copy of your bank statement showing the direct deposit or you may submit a copy of your rebate payment confirmation printed from the PA Department of Revenue website.

Q. If I did not make a copy of my State Rebate check, can I submit a copy of my bank statement showing the amount I deposited into my bank account?

A. No. If you received a State Rebate check you must submit a copy of your state rebate check received from the PA Department of Revenue or you may submit a copy of your rebate payment confirmation printed from the PA Department of Revenue website.

Q. Where can I obtain a copy of my PA Department of Revenue rebate payment confirmation?

A. Visit the PA Department of Revenue website at <https://www.revenue.pa.gov> and click on Property Tax/Rent Rebate Status. Choose 2023 from the dropdown menu and enter your birthdate and social security number. Click the blue “Search” box. Your rebate confirmation will populate. This page may be printed to serve as your payment confirmation.

**East Penn School District
Property Tax Rebate Program Instructions**

QUESTION AND ANSWER GUIDANCE

Page 3

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. The school district rebate is based on school district property taxes only. The amount of the State and School rebates cannot exceed the 2023-2024 school real estate tax bill. If this happens, the school rebate will be reduced to equal but not exceed the school real estate tax bill.

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

- A. All eligible taxpayers must file an East Penn School District Property Tax Rebate Application PTR-1000 for 2023 with the District and include a signed copy of the PA-1000 for 2023, a copy of your State rebate check, and a copy of a receipted 2023-2024 school tax bill paid-in-full. The East Penn School District Property Tax Rebate Application PTR-1000 must be signed and dated and sent in by the appropriate deadline to be eligible to receive a rebate.

NOTE: You must be approved by the State for their rebate before you can be eligible to receive the School District's rebate.

Q. When do I file my East Penn School District Property Tax Rebate Application PTR-1000? Is there a deadline?

- A. The East Penn School District Property Tax Rebate Application PTR-1000 for 2023 must be filed between July 1, 2024 and May 30, 2025. No East Penn School District Property Tax Rebate Applications PTR-1000 for 2023 will be accepted AFTER May 30, 2025.

Q. Where do I send my East Penn School District Property Tax Rebate Application PTR-1000?

- A. East Penn School District Property Tax Rebate Application PTR-1000 and supporting documents should be mailed to the following address:

East Penn School District
Attn: Property Tax Rebate Program
800 Pine Street
Emmaus, PA 18049

**East Penn School District
Property Tax Rebate Program Instructions**

QUESTION AND ANSWER GUIDANCE

Page 4

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

A. In any case in which a Tax Rebate Claim form (PTR-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.

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

A. If you have any questions, please call the East Penn School District Business Office at (610) 966-8300, Monday through Friday, 8:00AM to 3:00PM.

Q. Where can I obtain assistance completing the East Penn School District Property Tax Rebate Application PTR-1000?

A. State Representatives Offices will assist in completing the PTR-1000 application.

Q. Where can I get an East Penn School District Property Tax Rebate Application PTR-1000?

A. Application forms can be obtained in the following ways:

East Penn School District Business Office located in the Administration Building, 800 Pine Street, Emmaus. Phone (610) 966-8300.

District website (Business Office section): www.eastpennsd.org

From the office of your State Representative:

Hon. Ryan Mackenzie
Lower Macungie Twp Building
3402 Brookside Road
Macungie, PA 18062
Phone: 610-965-9933

Hon. Peter Schweyer
1501 Lehigh Street
Suite 206
Allentown, PA 18103
Phone: 610-791-6270

Hon. Milou Mackenzie
1425 Mountain Drive North
Bethlehem, PA 18015
Phone: 610-965-5830