

UPPER DUBLIN SCHOOL DISTRICT SCHOOL BOARD OF DIRECTORS APPROVES PROPERTY TAX AND RENT REBATE PROGRAM

At the May 2020 Legislative meeting, the Upper Dublin School District (UDSD) Board of School Directors unanimously approved a property tax rebate program that will provide a rebate of up to \$390 for certain homeowners and renters.

To qualify for this rebate, applicants must have a household income of no more than \$35,000 annually, and:

- be 65 years of age or older; or
- be a widow and widower aged 50 years of age or older; or
- be permanently disabled and 18 years of age or older.

The property tax and rent rebate program is based on the existing Pennsylvania Property Tax and Rent Rebate program which has been in effect since 1971 and is funded by state lottery and slot machine proceeds. Upper Dublin homeowners and renters must first qualify and be approved for the state rebate program to qualify for the district rebate program. Upper Dublin School District is granting a 40 percent rebate as follows:

- 40 percent (maximum \$390) annual rebate for Upper Dublin homeowners and renters with a yearly household income between \$0 to \$8,000;
- 40 percent (maximum \$300) annual rebate for Upper Dublin homeowners and renters with a yearly household income between \$8,001 to \$15,000;
- 40 percent (maximum \$180) annual rebate for Upper Dublin homeowners only with a yearly household income between \$15,001 to \$18,000; and
- 40 percent (maximum \$150) annual rebate for Upper Dublin homeowners only with a yearly household income between \$18,001 to \$35,000.

This program was approved, by resolution, for the 2020-2021 tax year and the program will require an annual review and approval to extend the program as part of the budget process.

For those who qualify for the Tax Rebate Program, the form can be found on the back of this letter and is also available on the school district website.

Members of the UDSD Business Office can answer questions about the program, but cannot assist in completing the form. Please contact Andrew Lechman at alechman@udsd.org or 215-643-8811.

**UPPER DUBLIN SCHOOL DISTRICT
PROPERTY TAX REBATE
UDSD Tax Year 2020-2021, for year 2019 PA-1000**

FILING INSTRUCTIONS

WHERE TO FILE: UDSD Administration Offices, 1580 Fort Washington Avenue, Maple Glen, PA 19002

WHEN TO FILE: After July 1, 2020 but before June 1, 2021

***PLEASE COMPLETE ALL REQUESTED INFORMATION* Please print legibly or type**

PART A - Personal Information

Name of Claimant:

Address of Claimant:

Phone Number:

Parcel Number (Found on Tax Bill):

Birth Date of Claimant:

Social Security Number of Claimant:

PART B - Form PA-1000 2019 (Property Tax or Rent Rebate Claim)

Insert amount from **Line 13** on Form **PA-1000 2019** (Total Income) \$

Inserted amount in above PART B may not exceed \$35,000 for owners or \$15,000 for renters.

Complete Applicable Section C

PART C (1) - FOR PROPERTY OWNERS ONLY - Calculation of Property Tax Rebate from Upper Dublin SD.

(a) Insert total property taxes paid from **Line 14** on Form **PA-1000 2019** \$

(b) Insert Property Tax Rebate amount from **Line 15** on Form **PA-1000 2019** \$

(c) Subtract line (b) from line (a) = \$

(d) Percentage Rebate Factor

x 40%

(e) Multiply line (b) by line (d) = \$

(f) Property Tax Rebate from the School District (insert the lessor of line (c) and line (e)) \$

Inserted amount on line (f) above may not exceed \$390.00

PART C (2) - FOR RENTERS ONLY - Calculation of Rent Rebate from Upper Dublin SD.

(a) Insert amount from **Line 17** on Form **PA-1000 2019** \$

(b) Insert amount from **Line 18** on Form **PA-1000 2019** (Rent Rebate) \$

(c) Subtract line (b) from line (a) = \$

(d) Percentage Rebate Factor

x 40%

(e) Multiply line (b) by line (d) = \$

(f) Rent Tax Rebate from the School District (insert the lessor of line (c) and line (e)) \$

Inserted amount on line (f) above may not exceed \$260.00

PART C (3) - COMBINED OWNERS/RENTERS ONLY - Calculation of Tax/Rent Rebate from Upper Dublin SD.

(a) Insert amount from **Line 17** on Form **PA-1000 2019** \$

(b) Insert Property Tax Rebate amount from **Line 19** on Form **PA-1000 2019** (Property Tax Rebate) \$

(c) Subtract line (b) from line (a) = \$

(d) Percentage Rebate Factor

x 40%

(e) Multiply line (b) by line (d) = \$

(f) Rent Tax Rebate from the School District (insert the lessor of line (c) and line (e)) \$

Inserted amount on line (f) above may not exceed \$390.00

PART D - Checklist of Required Information to send with Rebate Request Form

(a) Copy of **PA-1000 2019** (Property Tax or Rent Rebate Claim) filed with the PA Dept of Revenue

(b) Copy of **2019 PA-1000 Rebate Check** or **Statement of Direct Deposit from the State** as shown in Part C, Line (b)

I declare that this form is true, correct and complete, that the documents required and attached hereto under Part D are true and correct copies of those documents, and that to the best of my knowledge and belief this is the only claim filed by members of my household.

*Claimant's Signature

Printed Name of Preparer (if other than Claimant)

Date

Signature of Preparer (if other than Claimant)



Did you enclose all of your copies?

DID YOU SIGN AND DATE THIS FORM?

Telephone Number of Preparer (if other than Claimant)