



Claim for Real Property Tax Credit For Homeowners and Renters

Step 1 – Enter identifying information

Your first name and middle initial		Your last name (for a joint claim, enter spouse's name on line below)		Your date of birth (mm-dd-yyyy)	Your social security number
Spouse's first name and middle initial		Spouse's last name		Spouse's date of birth (mm-dd-yyyy)	Spouse's social security number
Current mailing address (number and street or rural route)				Apartment number	New York State county of residence
City, village, or post office		State	ZIP code	Country (if not United States)	
Street address of New York residence that qualifies you for this credit, if different from above					You must enter date(s) of birth and social security number(s) above.
City, village, or post office		State	ZIP code		

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Step 2 – Determine eligibility (For lines 1 through 6, mark an X in the appropriate box.)

- Were you a New York State resident for all of 2013? 1 Yes No
- Did you occupy the same residence for at least six months during 2013? 2 Yes No
If you marked an X in the **No** box on line 1 or 2, **stop**; you do not qualify for this credit.
- Did you own real property with a current market value of more than \$85,000 during 2013? 3 Yes No
- Can you be claimed as a dependent on another taxpayer's 2013 federal return? 4 Yes No
- Did you reside in public housing, or other residence completely exempted from real property taxes in 2013? (see instr.) 5 Yes No
If you marked an X in the **Yes** box on line 3, 4, or 5, **stop**; you do not qualify for this credit.
- Did you live in a nursing home during 2013? (If you mark an X in the Yes box, see instructions.) 6 Yes No

7 Complete below for the qualifying household member 65 or older (see instructions).

A – First name	Last name	B – Social security number	C – Date of birth (mm-dd-yyyy)

8 Complete below for all household members not included on line 7 (submit additional sheets if needed; see instructions).

A – First name	Last name	B – Social security number	C – Date of birth (mm-dd-yyyy)

Step 3 – Determine household gross income

Enter the total of all amounts, even if not taxable, that you, your spouse (if married), and all other household members received during 2013.

9 Federal adjusted gross income If any household members do not have to file a federal return, see instructions	9	.00
10 New York State additions to federal adjusted gross income	10	.00
11 Social security payments not included on line 9	11	.00
12 Supplemental security income (SSI) payments	12	.00
13 Pensions and annuities (including railroad retirement benefits) not included on lines 9 through 12	13	.00
14 Cash public assistance and relief.....	14	.00
15 Other income	15	.00
16 Household gross income (add lines 9 through 15).....	16	.00
If line 16 is more than \$18,000, stop ; you do not qualify for this credit.		
17 Enter rate from Table 1 (see instructions).....	17	
18 Multiply line 16 by line 17	18	.00



Step 4 – Compute real property tax

Renters only	19	Enter the total amount of rent you and all members of your household paid during the year 2013. <i>(Do not include any subsidized part of your rental charge.)</i>	19	.00	
	Homeowners only	20	Adjusted rent – If line 19 includes charges for: Enter on line 20 heat, gas, electricity, furnishings, and board..... 50% (.5) of line 19 heat, gas, electricity, and furnishings..... 75% (.75) of line 19 heat, gas, and electricity 80% (.8) of line 19 heat or heat and gas 85% (.85) of line 19 none of the above 100% of line 19.....	20	.00
		21	Average monthly adjusted rent <i>(divide line 20 by the number of months you paid rent)</i> If line 21 is more than \$450, stop ; you do not qualify for this credit.	21	.00
		22	Multiply line 20 by 25% (.25); enter here and on line 28	22	.00
		23	Real property taxes paid during the year 2013 <i>(see instructions)</i>	23	.00
24		Special assessments	24	.00	
25	Add lines 23 and 24	25	.00		
26	Exemption for homeowners 65 and over <i>(optional - see instructions)</i>	26	.00		
27	Add lines 25 and 26; enter here and on line 28	27	.00		

Step 5 – Compute credit amount

28 Renters: Enter amount from line 22. Homeowners: Enter amount from line 27 <i>(see instructions)</i>	28	.00
If line 28 is zero or less, stop ; no credit is allowed.		
29 Enter amount from line 18	29	.00
If line 29 is equal to or more than line 28, stop ; you do not qualify for this credit.		
30 Subtract line 29 from line 28.....	30	.00
31 Multiply line 30 by 50% (.5) <i>(However, if you entered an amount on line 26, multiply line 30 by 25% (.25).)</i>	31	.00
32 Credit limit <i>(see instructions; enter amount from chart)</i>	32	.00
33 Enter the amount from line 32 or 31, whichever is less. This is the credit for your household. <i>(If more than one member of your household is filing Form IT-214, see instructions.)</i>	33	.00

- If you are **filing this claim with your New York State income tax return**:
 Enter the line 33 amount on Form IT-201, line 67.
- If you are **not filing this claim with a New York State income tax return** *(see instructions)*:
 Mark one refund choice: direct deposit *(fill in line 34)* - or - debit card - or - paper check

Step 6 – Enter account information *(see instructions)*

34 Direct deposit *(see instructions)*: Complete the following to have your refund deposited directly to your bank account.

34a Routing number **34b** Account type: Personal checking - or - Personal savings - or - Business checking - or - Business savings

Note: If the funds for your refund would go to an account outside the U.S., mark an **X** in this box *(see instructions)* **34c** Account number

Third-party designee? <i>(see instr.)</i> Yes <input type="checkbox"/> No <input type="checkbox"/>	Print designee's name	Designee's phone number ()	Personal identification number (PIN)
	E-mail:		

▼ Paid preparer must complete <i>(see instr.)</i> ▼		Date
Preparer's signature		Preparer's NYTPRN
Firm's name <i>(or yours, if self-employed)</i>		Preparer's PTIN or SSN
Address		Employer identification number
E-mail:		Mark an X if self-employed <input type="checkbox"/>

▼ Taxpayer(s) must sign here ▼	
Your signature	
Your occupation	
Spouse's signature and occupation <i>(if joint claim)</i>	
Date	Daytime phone number ()
E-mail:	

- If you **are filing** a NYS income tax return, submit this form with your return.
- If you **are not filing** a NYS income tax return, mail this form to:
NYS TAX PROCESSING, PO BOX 22017, ALBANY NY 12201-2017.

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