

CAUTION:

The 2016 Schedule H-EZ may not be
filed prior to January 1, 2017

DRAFT
8-24-16

Claimant's social security number		Spouse's social security number		Check below then fill in either the name of city, village, or town, and the county in which you lived at the end of 2016. <input type="checkbox"/> City <input type="checkbox"/> Village <input type="checkbox"/> Town City, village, or town <input type="checkbox"/> _____ County of <input type="checkbox"/> _____
Claimant's legal last name	Legal first name	M.I.		
Spouse's legal last name	Spouse's legal first name	M.I.		
Current home address (number and street)			Apt. no.	
City or post office	State	Zip code		
Special conditions <input type="checkbox"/>				(See page 7 of the Schedule H instructions.)

- 1 a** What was your age as of December 31, 2016? (If you were under 18, you do not qualify for homestead credit for 2016.) **1 a** Fill in age
- b** If you are married and your spouse was age 65 or over as of December 31, 2016, check where indicated **1 b** Check here
- 2** Were you a legal resident of Wisconsin from 1-1-16 through 12-31-16? (If "No," you do not qualify.) **2** Yes No
- 3** Were you claimed or will you be claimed as a dependent on someone else's 2016 federal income tax return? (If "Yes" and you were under age 62 on December 31, 2016, you do not qualify.) **3** Yes No

ATTACH rent certificate or property tax bill

Household Income	Print numbers like this → 0 1 2 3 4 5 6 7 8 9	NO COMMAS; NO CENTS
4 Wisconsin income from line 12 of Form 1A or line 13 of Form 1 (see instructions)	4	.00
5 If not filing a 2016 Wisconsin return, fill in Wisconsin taxable income below.		
a Wages .00 + Interest .00 + Dividends .00 = . . .	5 a	.00
b Other taxable income (list type and amount) _____	5 b	.00
6 Nontaxable income not included on line 4, 5a, or 5b.		
a Unemployment compensation	6 a	.00
b Social security, federal and state SSI, SSI-E, SSD, and CTS payments (<i>see instructions</i>)	6 b	.00
c Railroad retirement benefits	6 c	.00
d Pensions, annuities, and other retirement plan distributions	6 d	.00
e Contributions to deferred compensation plans (<i>see box 12 of wage statements</i>)	6 e	.00
f Contributions to IRA and SIMPLE plans	6 f	.00
g Interest on United States bonds and notes and state and municipal bonds	6 g	.00
h Child support, maintenance payments, and other support money (court ordered)	6 h	.00
i Wisconsin Works (W2) payments, county relief, kinship care, and other cash public assistance	6 i	.00
7 a Add lines 4 through 6i (if less than the total of lines 8, 9a, and 9c, see instructions)	7 a	.00
b Fill in number of qualifying dependents (do not count yourself or your spouse) <input type="text"/> x \$500 =	7 b	.00
c Household income. Subtract line 7b from line 7a (if \$24,680 or more, no credit is allowed)	7 c	.00

Taxes and/or Rent	Before completing this section, see instructions for taxes and/or rent (STEP 4).
8 Homeowners—Net 2016 property taxes on your homestead. Attach your 2016 tax bill	8 .00
9 Renters— Rent from your rent certificate(s), line 8a (or Shared Living Expenses Schedule). Heat included (8b of rent certificate is "Yes") 9 a <input type="text"/> .00 x .20 (20%) = 9 b .00 Heat not included (8b of rent certificate is "No") 9 c <input type="text"/> .00 x .25 (25%) = 9 d .00	
10 Add lines 8, 9b, and 9d (or enter amount from line 6 of Taxes/Rent Reduction Schedule)	10 .00

Credit Computation	
11 Fill in the smaller of the amount on line 10 or \$1,460	11 .00
12 Using the amount on line 7c, fill in the appropriate amount from Table A (page 17)	12 .00
13 Subtract line 12 from line 11 (if line 12 is more than line 11, fill in 0; no credit is allowable)	13 .00
14 Homestead credit—Using the amount on line 13, fill in the credit from Table B (page 18)	14 .00

Under penalties of law, I declare this homestead credit claim and all attachments are true, correct, and complete to the best of my knowledge and belief.

Sign Here Claimant's signature Spouse's signature Date Daytime phone number
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Instructions for Schedule H-EZ

If you qualify for homestead credit, you may be able to use Schedule H-EZ to file your claim. See “Do you Qualify?” and “Which Schedule to File” on page 4 of the Schedule H instructions.

Filling in Schedule H-EZ Use black ink. Round off cents (drop amounts under 50¢ and increase amounts from 50¢ to 99¢ to the next dollar). Do not use commas or dollar signs.

Amending Schedule H-EZ See “Amending Schedule H or H-EZ” on page 6 of the Schedule H instructions.

STEP 1: CLAIMANT INFORMATION

Print or type all information requested in the spaces provided. Include your social security number (and your spouse’s, if applicable) and your tax district. Do not use an address label.

STEP 2: QUESTIONS

Complete lines 1 through 3. For more information on legal residency, see the instructions for line 2 of Schedule H.

STEP 3: HOUSEHOLD INCOME

Note: If your spouse died in 2016, see Part 5 on page 16 of the Schedule H instructions before you continue.

Line 4 – Income from Tax Return Fill in the income from your 2016 Wisconsin income tax return. For more information, including instructions for when you have already filed your return, see the instructions for line 7 of Schedule H.

Line 5 – Income - No Tax Return Fill in your total (and your spouse’s total, if married) wages, interest, dividends, and other income taxable to Wisconsin on lines 5a and 5b. Attach a separate schedule if more space is needed. For more information, including an available subtraction for medical and long-term care insurance costs, see the instructions for line 8 of Schedule H.

Lines 6a through 6i – Nontaxable Income Fill in all nontaxable household income received in 2016 from any of the sources indicated. If you are married, combine the incomes of both spouses. Do not include amounts reported on line 4, 5a, or 5b. For more information, see the instructions for lines 9a through 9g, 9i, and 9j of Schedule H. **Note:** Include Medicare premium deductions in any amounts entered on lines 6b or 6c.

Line 7a Is the amount on line 7a less than your rent or property taxes? If yes, attach a note explaining how you paid your rent or property taxes and your other living expenses (food, utilities, clothing, etc.).

Line 7b – Qualifying Dependents Fill in the number of qualifying dependents. Multiply that amount by \$500. Fill in the result on line 7b. For a definition of “qualifying dependent,” see the instructions for line 12b of Schedule H.

STEP 4: TAXES AND/OR RENT

Homeowners – Fill in the net 2016 property taxes on your homestead on line 8. For more information, including a definition of “net property taxes,” see the instructions for line 13 of Schedule H.

Renters – Complete lines 9a and 9b if heat was included in your rent and/or lines 9c and 9d if heat was **not** included. For more information, see the instructions for line 14 of Schedule H.

Exception Do any of the following apply to you? If yes, you may be required to reduce your net property taxes and/or rent or attach additional information to Schedule H-EZ.

- You owned/rented a mobile or manufactured home and/or the land on which it was located (see item 3 under Exceptions: Homeowners on page 12 of the Schedule H instructions and item 4 under Exceptions: Renters on page 13).
- There are names on the property tax bill other than yours or your spouse’s and/or you owned your homestead with others in 2016 (see items 1 and 2 under Exceptions: Homeowners on pages 11 and 12 of the Schedule H instructions).
- The property tax bill does not show any lottery and gaming credit (see item 5 under Exceptions: Homeowners on page 12 of the Schedule H instructions).
- You moved during 2016 (see item 2 under Exception: Homeowners and/or Renters on page 13 of the Schedule H instructions).
- You received a) any Wisconsin Works (W2) payments or b) county relief of \$400 or more for any month of 2016. Complete the Taxes/Rent Reduction Schedule below.

Taxes/Rent Reduction Schedule	
1 Homeowners – fill in the net 2016 property taxes on your homestead	1 _____
2 Renters – if heat was included, fill in 20% (.20), or if heat was not included, fill in 25% (.25), of rent from line 8a of the rent certificate(s) .	2 _____
3 Add line 1 and line 2; fill in the smaller of the total or \$1,460	3 _____
4 Divide line 3 by 12	4 _____
5 Number of months in 2016 for which you did not receive a) any Wisconsin Works (W2) payments or b) county relief payments of \$400 or more	5 _____
6 Multiply line 4 by line 5. Fill in here and on line 10 (do not fill in line 8 or 9) of Schedule H-EZ	6 _____

STEP 5: CREDIT COMPUTATION

Lines 11 through 14 – Refer to Tables A and B on pages 17 and 18 of the Schedule H instructions to determine your homestead credit. If filing a Wisconsin income tax return, fill in the credit amount on line 31 of Form 1A or line 45 of Form 1. Do you want the Department of Revenue to compute your credit? If yes, do not complete these lines. The department will notify you of the amount of your credit.

STEP 6: SIGNING AND FILING YOUR CLAIM

Sign and Date Your Claim You must sign and date your Schedule H-EZ. If married, your spouse must also sign. **Note:** A homestead credit claim may not be signed for or filed on behalf of a deceased person.

How to Assemble Before filing Schedule H-EZ, see “How to Assemble” on page 14 of the Schedule H instructions.

Age 65 or older? The **Property Tax Deferral Loan Program** can help pay your property taxes. See page 3 of Schedule H for more information.