

## Homestead Credit Notes and Attachments Checklist

1. Check all boxes that apply.
2. Fill in appropriate spaces.
3. Enter required notes and explanations in #31 data field.
4. When copies of documents are required, attach them to the Form W-RA, Required Attachments for Electronic Filing, that must be submitted.

The Schedule H instruction booklet page number for the description is indicated in the page column.

	Description	Page
<input type="checkbox"/>	1 Former spouse must pay a tax liability owed to the Department of Revenue per attached divorce judgement . . . . .	6
<input type="checkbox"/>	2 Sources of income reported on Line 8b of Schedule H note is attached . . . . .	11
<input type="checkbox"/>	3 The distributive share of partnership, limited liability company (LLC), and tax-option (S) corporation depreciation, Section 179 expense, depletion, amortization, and intangible drilling costs is "None" . . . . .	15
<input type="checkbox"/>	4 Car or truck expenses claimed using the standard mileage rate. <b>Fill in the number of miles</b> _____ . . . . .	15
<input type="checkbox"/>	5 Adjusted basis of car or truck reached zero using standard mileage rate . . . . .	15
<input type="checkbox"/>	6 Car or truck expenses claimed using the actual expense method . . . . .	15
<input type="checkbox"/>	7 The computation of gain from the sale or exchange of a principal residence excluded from taxable income under Section 121 of the Internal Revenue Code note is attached. . . . .	14
<input type="checkbox"/>	8 Claimant or spouse are age 65 or over and received no social security, SSI, or railroad retirement benefits . . . . .	13
<input type="checkbox"/>	9 All or part of a pension or annuity distribution includes a rollover or a tax-free exchange . . . . .	13
<input type="checkbox"/>	10 Nontaxable repaid amounts note is attached . . . . .	12
<input type="checkbox"/>	11 Very little or no household income note is attached . . . . .	16
<input type="checkbox"/>	12 Ownership of property document is attached . . . . .	17
<input type="checkbox"/>	13 Partial ownership interest was inherited with terms of the will requiring payment of all the property taxes. Copy of will is attached. . . . .	17
<input type="checkbox"/>	14 Personal property tax bill is for a mobile or manufactured home . . . . .	17
<input type="checkbox"/>	15 Two or more property tax bills. Drawing showing description, size, and location of each parcel is attached . . . . .	17
<input type="checkbox"/>	16 No lottery and gaming credit on property tax bill. <b>Fill in the amount claimed \$</b> _____ . . . . .	17
<input type="checkbox"/>	17 No lottery and gaming credit on property tax bill. Lottery and gaming credit not claimed by homeowner. . . . .	18
<input type="checkbox"/>	18 Landlord will not sign rent certificate. Rent verification is attached . . . . .	18
<input type="checkbox"/>	19 Claimant moved during the year. Note of the address of each dwelling and the dates lived there is attached . . . . .	18
<input type="checkbox"/>	20 Less than 12 month's property taxes and/or rent are claimed. Note of where claimant lived for the balance of the year is attached . . . . .	18
<input type="checkbox"/>	21 When more than one acre of land is rented, note from landlord indicating the amount of rent for home and one acre of land is attached . . . . .	19
<input type="checkbox"/>	22 Moved to tax-exempt housing. Claiming property taxes for up to 12 months after the move note is attached. . . . .	19
<input type="checkbox"/>	23 <b>Married but separated all year:</b> Claimant and spouse did not reside together at all during the year and neither the claimant nor claimant's spouse notified each other of marital property income . . . . .	21
<input type="checkbox"/>	24 <b>Married but separated all year:</b> Claimant and spouse did not reside together at all during the year and one or both spouses notified the other spouse of marital property income. Required information is attached . . . . .	21
<input type="checkbox"/>	25 <b>Married but separated part of year:</b> Required information is attached. . . . .	21
<input type="checkbox"/>	26 <b>Marriage took place during year:</b> Required information is attached. . . . .	22
<input type="checkbox"/>	27 <b>Divorce took place during year:</b> Claimant and spouse did not reside together at all during the year and neither the claimant nor claimant's spouse notified each other of marital property income . . . . .	23
<input type="checkbox"/>	28 <b>Divorce took place during year:</b> Claimant and spouse did reside together for part of the year and/or one or both spouses notified the other spouse of marital property income. Required information is attached. . . . .	23
<input type="checkbox"/>	29 <b>Spouse died during year:</b> Date of death - ____ / ____ / 2020 . . . . .	23
<input type="checkbox"/>	30 Claimant resided in property address shown on tax bill but used a different mailing address on tax return. . . . .	-
<input type="checkbox"/>	31 Required notes and explanations in following data fields . . . . .	-

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