

CAUTION:

The 2020 Schedule H-EZ may not be
filed prior to January 1, 2021

Claimant's social security number		Spouse's social security number		Check below then fill in either the name of the city, village, or town, and the county in which you lived at the end of 2020. <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	Claimant's 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 10 of the Schedule H instructions.)

- 1 a** What was your age as of December 31, 2020? (If you were under 18, you do not qualify for homestead credit for 2020.) **1a** Fill in age
- b** What was your spouse's age as of December 31, 2020? **1b** Fill in age
- c** If you and your spouse were under age 62 as of December 31, 2020, were you or your spouse disabled? (See instructions) **1c** Yes No
- d** If you and your spouse were not disabled, did you or your spouse have positive earned income (see Schedule H instructions) in 2020? (If "No", you do not qualify - see instructions) **1d** Yes No
- 2** Were you a legal resident of Wisconsin from 1-1-20 through 12-31-20? (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 2020 federal income tax return? (If "Yes" and you were under age 62 on December 31, 2020, you do not qualify.) **3** Yes No

Household Income Print numbers like this → 0 1 2 3 4 5 6 7 8 9 **NO COMMAS; NO CENTS**

ATTACH rent certificate or property tax bill

- 4** Wisconsin income from line 5 of Form 1 (see instructions) **4** _____ .00
- 5** If **not filing** a 2020 Wisconsin return, fill in Wisconsin **taxable** income below.
- a** Wages _____ .00 + Interest _____ .00 + Dividends _____ .00 = ... **5a** _____ .00
- b** Other taxable income (list type and amount) _____ **5b** _____ .00
- c** Medical and long-term care insurance subtraction. Enter as a negative number **5c** _____ .00
- 6 Nontaxable income not included on line 4, 5a, or 5b above.**
- a** Unemployment compensation **6a** _____ .00
- b** Social security, federal **and** state SSI, SSI-E, SSD, and CTS payments (see instructions) **6b** _____ .00
- c** Railroad retirement benefits **6c** _____ .00
- d** Pensions, annuities, and other retirement plan distributions **6d** _____ .00
- e** Contributions to deferred compensation plans (see box 12 of wage statements) **6e** _____ .00
- f** Contributions to IRA and SIMPLE plans **6f** _____ .00
- g** Interest on United States bonds and notes and state and municipal bonds **6g** _____ .00
- h** Child support, maintenance payments, and other support money (court ordered) **6h** _____ .00
- i** Wisconsin Works (W2) payments, county relief, kinship care, and other cash public assistance **6i** _____ .00
- 7 a** Add lines 4 through 6i (if less than the total of lines 8, 9a, and 9c, see instructions) **7a** _____ .00
- b** Fill in number of qualifying dependents (do not count yourself or your spouse) x \$500 = **7b** _____ .00
- c** Household income. Subtract line 7b from line 7a (if \$24,680 or more, no credit is allowed) **7c** _____ .00

Taxes and/or Rent Before completing this section, see instructions for taxes and/or rent (STEP 4).

- 8** Homeowners – Net **2020** property taxes on your homestead. Attach your 2020 tax bill **8** _____ .00
- 9** Renters – **Rent** from line 8a of your rent certificate(s) or line 7 of your Shared Living Expenses Schedule.
- Heat included (8b of rent certificate is "Yes") **9a** _____ .00 x .20 (20%) = **9b** _____ .00
- Heat not included (8b of rent certificate is "No") **9c** _____ .00 x .25 (25%) = **9d** _____ .00
- 10** Add lines 8, 9b, and 9d (or enter amount from line 6 of Taxes/Rent Reduction Schedule) **10** _____ .00



Credit Computation

Table with 4 rows: 11 Fill in the smaller of the amount on line 10 or \$1,460; 12 Using the amount on line 7c, fill in the appropriate amount from Table A; 13 Subtract line 12 from line 11; 14 Homestead credit - Using the amount on line 13, fill in the credit from Table B.

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

Mail to: Wisconsin Department of Revenue, PO Box 34, Madison WI 53786-0001



For Department Use Only

Form with 5 boxes for Department Use Only

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 page 5 of the Schedule H instructions.

Filling in Schedule H-EZ Use black ink. Round off cents. Do not use commas or dollar signs.

Amending Schedule H-EZ See "Amending Schedule H or H-EZ" on page 9 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. See Schedule H instructions.

STEP 3: HOUSEHOLD INCOME

Note: If your spouse died in 2020, see Part 5 on page 23 of the Schedule H instructions before you continue.

Line 4 - Income from Tax Return Fill in the income from your 2020 Wisconsin income tax return.

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. Fill in your medical and long-term care insurance subtraction on line 5c. Attach a separate schedule if more space is needed. For more information, see the instructions for line 8 of Schedule H.

Lines 6a through 6i - Nontaxable Income Fill in all nontaxable household income received in 2020 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, see the instructions for line 12a of Schedule H.

Line 7b - Qualifying Dependents Fill in the number of qualifying dependents. Multiply that amount by \$500. Fill in the result on line 7b.

STEP 4: TAXES AND/OR RENT

Homeowners - Fill in the net 2020 property taxes on your homestead on line 8. 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 lines 13 and 14 of Schedule H.

Exception You may be required to reduce your net property taxes and/or rent or attach additional information to Schedule H-EZ. See pages 17 to 19 of the Schedule H instructions.

If you received a) any Wisconsin Works (W2) payments or b) county relief of \$400 or more for any month of 2020, complete the Taxes/Rent Reduction Schedule below.

Taxes/Rent Reduction Schedule form with 6 numbered steps for calculation.

STEP 5: CREDIT COMPUTATION

Lines 11 through 14 - Refer to Tables A and B on pages 24 and 25 of the Schedule H instructions to determine your homestead credit. If filing a Wisconsin income tax return, fill in the credit amount on line 30 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. See "How to Assemble" on page 20 of the Schedule H instructions.

Age 65 or older? The Property Tax Deferral Loan Program can help pay your property taxes. See page 4 of Schedule H for more information.

Applicable Laws and Rules This document provides statements or interpretations of the following laws and regulations in effect as of October 29, 2020: Chapter 71, Wis. Stats.