



# 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 2014, 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 2014 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 2014 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 2014 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 2014 (see items 1 and 2 under Exceptions: Homeowners on page 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 2014 (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 2014. Complete the Taxes/Rent Reduction Schedule below.

Taxes/Rent Reduction Schedule	
1 Homeowners – fill in the net 2014 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 2014 for which you did <b>not</b> 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.