

Instructions for Schedule H-EZ

If you qualify for homestead credit (see page 2 of the Schedule H instructions), you may be able to use Schedule H-EZ to file your claim. See "Which Schedule to File" on page 3 to determine if Schedule H-EZ is right for you.

Filling in Schedule H-EZ 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 when filling in amounts.

Amending Schedule H-EZ See "Amending Schedule H or H-EZ" on page 4 of the Schedule H instructions.

STEP 1: CLAIMANT INFORMATION

Print or type all information requested in the spaces provided on Schedule H-EZ. Include your social security number (and your spouse's, if applicable), your telephone number, and your tax district. Do not use a return address label.

STEP 2: QUESTIONS

Fill in the information requested on 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 2006, see Part 5 on page 12 of the Schedule H instructions before completing the rest of Schedule H-EZ.

Line 4 – Income from Tax Return Fill in the income from your 2006 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 the amount of your (or the total of both spouses, 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, see the instructions for line 8 of Schedule H.

Lines 6a through 6i – Nontaxable Income Fill in all nontaxable household income received in 2006 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 7b – Qualifying Dependents Fill in the number of qualifying dependents. Multiply that amount by \$250. Fill in the result on line 7b. For information on who is considered a qualifying dependent, see the instructions for line 12b of Schedule H.

Line 7c – Total Household Income Is your household income 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.).

STEP 4: TAXES AND/OR RENT

Homeowners – Fill in the net 2006 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 home and/or the land on which it was located (see item 3 under Exceptions: Homeowners on page 8 of the Schedule H instructions and item 4 under Exceptions: Renters on page 9).
- There are names on the property tax bill other than yours or your spouse's and/or you owned your homestead with others in 2006 (see items 1 and 2 under Exceptions: Homeowners on page 8 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 9 of the Schedule H instructions).
- You moved during 2006 (see item 2 under Exception: Homeowners and/or Renters on page 9 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 2006. Complete the Taxes/Rent Reduction Schedule below.

| Taxes/Rent Reduction Schedule | |
|---|---------|
| 1 Homeowners – fill in the net 2006 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 13a of the rent certificate(s) ... | 2 _____ |
| 3 Add line 1 and line 2; fill in the smaller of the total or \$1,450 | 3 _____ |
| 4 Divide line 3 by 12 | 4 _____ |
| 5 Number of months in 2006 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 13 and 14 of the Schedule H instructions to determine your homestead credit. Do you want the department 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 10 of the Schedule H instructions.