

# H-EZ Wisconsin homestead credit 2008

Check here if an amended return

Claimant's social security number		Spouse's social security number	
Claimant's legal last name	Legal first name	M.I.	Check below then fill in either the name of city, village, or town, and the county in which you lived at the end of 2008. <input type="checkbox"/> City <input type="checkbox"/> Village <input type="checkbox"/> Town City, village, or town <input type="checkbox"/> County of <input type="checkbox"/>
Spouse's legal last name	Spouse's legal first name	M.I.	
Home address (number and street)			
City or post office	State	Zip code	<b>Special conditions</b> <input type="checkbox"/> (See page 7 of the Schedule H instructions)

- 1 a** What was your age as of December 31, 2008? (If you were under 18, you do not qualify for homestead credit for 2008.) **1 a** Fill in age
- b** If you are married and your spouse was age 65 or over as of December 31, 2008, check where indicated . . . . **1 b** Check here
- 2** Were you a legal resident of Wisconsin from 1-1-08 through 12-31-08? (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 2008 federal income tax return? (If "Yes" and you were under age 62 on December 31, 2008, 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 2008 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 caretaker supplement payments . . . . . **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 (see box 12 of wage statements) . . . . . **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 . . . . . **7 a** \_\_\_\_\_ .00
- b** Fill in number of qualifying dependents (do not count yourself or your spouse)  x \$250 = **7 b** \_\_\_\_\_ .00
- c** Household income. Subtract line 7b from line 7a (if \$24,500 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 **2008** property taxes on your homestead, whether paid or not . . . . . **8** \_\_\_\_\_ .00
- 9** Renters—**Rent** from your rent certificate(s), line 13a (or Shared Living Expenses Schedule).
- Heat included (13b of rent certificate is "Yes") . . . . . **9 a**  \_\_\_\_\_ .00 x .20 (20%) = **9 b** \_\_\_\_\_ .00
- Heat not included (13b of rent certificate is "No") . . . . . **9 c**  \_\_\_\_\_ .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 \$1,450 . . . . . **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 ( )

I-1015i

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



For Department Use Only  
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# Instructions for Schedule H-EZ

If you qualify for homestead credit (see page 4 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 4 to determine if Schedule H-EZ is right for you.

**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 when filling in amounts.

**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 2008, 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 2008 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, 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 2008 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 2008 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 2008 (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 2008 (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 2008. Complete the Taxes/Rent Reduction Schedule below.

Taxes/Rent Reduction Schedule	
1 Homeowners – fill in the net 2008 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 2008 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 32 of Form 1A or line 48 of Form 1. 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 14 of the Schedule H instructions.