

## Volunteer Income Tax Assistance (VITA) Program

### **HOMESTEAD FILING REQUIREMENTS**

#### **IMPORTANT INFORMATION FOR ANYONE ON FIXED INCOME FILING ONLY FOR THE HOMESTEAD CREDIT**

#### **Eligibility**

- Your household income must be under \$24,680 or less
- You must meet one of the following conditions.
  - You have **earned income** during the year
  - You (or your spouse) are disabled
  - You (or your spouse) are 62 years of age or older at the end of the year
- Must be a legal resident of Wisconsin for the entire year (January 1 – December 31<sup>st</sup>)

#### **Required Documentation for Wisconsin Homestead Credit Filing**

- You must have your social security card and current photo ID,
- Proof of disability (if under age 62)
  - Statement from Veteran's Administration certifying that claimant is receiving disability benefit due to 100% disability, or
  - Document from Social Security Administration stating date disability began, or
  - Statement from physician stating beginning date of disability and whether disability is permanent or temporary.
- Completed rent certificate **without** any errors or a copy of the property tax bill (if you are a homeowner.)

**Note:** If the landlord refuses to complete a rent certificate, you must include proof of rent payments. The State will only accept money order receipts or cancelled checks.  
**The State will not accept handwritten rent receipts, checkbook receipts or copies of bank statements.**
- Proof of all sources of household income, such as Social Security, Federal and State SSI benefits, caretaker supplement payments, kinship payments, child support, and /or printout of W2 benefits.

#### **Note: Copy Requests**

To obtain your form SSA-1099 (Social Security and SSI Federal Benefit Statement) or a printout of your annual information go to <https://faq.ssa.gov/en-us/Topic/article/KA-01723> or call **1-800-772-1213 - Monday through Friday, 8:00 am – 7:00 pm.**

To obtain a copy of State benefits please call:

**800-362-3002** For state SSI or

**414-273-1262** for Kinship payments