

Form PTR 2-A – Instructions

Part I – To Be Completed by Applicant

Social Security Number. If your marital/civil union status as of December 31, 2016, was single, enter only your social security number in the space provided on Form PTR-2A. If your status as of December 31, 2016, was married/CU couple, you must report both applicants' numbers in the order in which the names are listed on the application. If you were married or in a civil union but living apart from your spouse/CU partner, and you did not have access to or receive support from their income, you are considered "Single" for purposes of the property tax reimbursement. You should enter only your social security number on Form PTR-2A.

Name and Address. Print or type your name (last name first) and complete address of the property for which you are claiming the reimbursement in the spaces provided. Also include your spouse's/CU partner's name if filing jointly.

Block/Lot/Qualifier. Enter the block and lot numbers of the principal residence for which you are claiming the reimbursement in the spaces provided. Include qualifier if applicable. (Only condominiums may have qualifiers assigned to them.)

A. Multiple Owners. Check "Yes" if you owned the property that was your principal residence with someone who was not your spouse/CU partner — even if the other owner(s) did not live there. For example, you and your sister owned the home you lived in. If you (and your spouse/CU partner) were the sole owner(s), check "No."

B. Percentage of Ownership. If you answered "Yes" at Line A, enter the share (percentage) of the property that you (and your spouse/civil union partner) owned. For example, you and your spouse owned a home with your sister. Your sister did not live with you, and you and your spouse paid all the property taxes. You must enter 50% as your share of ownership because you and your spouse owned only one-half (50%) of the property. The shares of ownership of the property are considered to be held equally by all owners. If the shares of ownership are not equal, you must provide documentation as to the percentage of ownership.

C. Multiunit Properties. Check "Yes" if your principal residence was a unit in a multiunit property that you owned. For example, you owned a property consisting of four residential units, and you occupied one of the units as your principal residence. If the property is not a multiunit property, check "No."

NOTE: Residents of condominium complexes, co-ops, and continuing care retirement facilities are not considered to be living in multiunit properties and should check "No."

D. Percentage of Occupancy. If you answered "Yes" at Line C, enter the share (percentage) of the property used as your principal residence. For example, you owned a four-unit property. The units are equal in size, and one of the units was your principal residence. You occupied one-fourth (25%) of the property as your principal residence. Enter 25% as your share of occupancy.

Part II – To Be Completed by Tax Collector

Enter the appropriate amounts for calendar year 2016 as follows:

Line 1. Enter the assessed value of the property. If the assessed value changed for the tax year, use the final assessed value.

Line 2. Enter the tax rate. Include fire and other special tax rates.

Line 3. Multiply the assessed value on Line 1 by the tax rate on Line 2 and enter the result on Line 3. This is the total amount of taxes due before any deductions and/or credits are subtracted (e.g., senior citizen's deduction, homestead benefit credit).

Line 4. Enter the amount of any Regional Efficiency Aid Program (REAP) credit the homeowner(s) received.

Line 5. If the applicant answered "No" to the questions at both Line A and Line C, enter the amount of property taxes from Line 3.

If the applicant answered "Yes" at either Line A or Line C, you must apportion the amount of property taxes to be entered on Line 5. If title to the property is held by the eligible applicant with others as tenants in common or joint tenants (except in the case of husband and wife or CU partners), or if the property consists of more than one unit, the applicant is only eligible for the proportionate share of the reimbursement that reflects the percentage of ownership or the percentage of occupancy.

Multiple Owners. If the applicant answered "Yes" at Part I, Line A, multiply the amount of property taxes on Line 3 by the percentage of ownership shown at Part I, Line B, and enter the result on Line 5.

Multiunit Properties. If the applicant answered "Yes" at Part I, Line C, multiply the amount of property taxes on Line 3 by the percentage of occupancy shown at Part I, Line D, and enter the result on Line 5.

If the applicant answered "Yes" to the questions at both Lines A and C, multiply the amount of property taxes on Line 3 by the percentage of occupancy shown at Part I, Line D, and enter the result on Line 5.

Certification. Complete the certification portion of Form PTR-2A. Sign and date the certification and place the authorization stamp in the space provided. (Use blue or black ink.)