

## 2023 Schedule H-EZ Instructions

If you qualify for homestead credit, you may be able to use Schedule H-EZ to file your claim. See pages 4 and 5 of the Schedule H instructions.

**Filling in Schedule H-EZ** Use black ink. Round off cents. Do not use commas or dollar signs.

**Amending Schedule H-EZ** See “Amending Schedule H or H-EZ” on page 9 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. See Schedule H instructions.

### STEP 3: HOUSEHOLD INCOME

**Note:** If your spouse died in 2023, see Part 5 on page 24 of the Schedule H instructions before you continue.

**Line 4 – Income from Tax Return** Fill in the income from your 2023 Wisconsin income tax return.

**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. Fill in your medical and long-term care insurance subtraction on line 5c. 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 2023 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, see the instructions for line 12a of Schedule H.

**Line 7b – Qualifying Dependents** Fill in the number of qualifying dependents. Multiply that amount by \$500. Fill in the result on line 7b.

### STEP 4: TAXES AND/OR RENT

**Homeowners** – Fill in the net 2023 property taxes on your homestead on line 8. **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 lines 13 and 14 of Schedule H.

**Exception** You may be required to reduce your net property taxes and/or rent or attach additional information to Schedule H-EZ. See pages 17 to 20 of the Schedule H instructions.

If you received a) any Wisconsin Works (W2) payments or b) county relief of \$400 or more for any month of 2023, complete the Taxes/Rent Reduction Schedule below.

### Taxes/Rent Reduction Schedule

|   |  |   |       |
|---|--|---|-------|
| 1 | Homeowners – fill in the net 2023 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 2023 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 25 and 26 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 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. See “How to Assemble” on page 21 of the Schedule H instructions.

**Wisconsin Identity Protection PIN** If you received a Wisconsin Identity Protection PIN from the Department of Revenue, enter it in the Wisconsin Identity Protection PIN spaces provided to the right of your signature. You must correctly enter all seven characters of your Wisconsin Identity Protection PIN. If you didn’t receive a Wisconsin Identity Protection PIN, leave these spaces blank. **Caution:** This Wisconsin Identity Protection PIN is different from any Identity Protection PIN you may have received from the IRS.

If you and your spouse are filing a claim together and both the claimant and the claimant’s spouse receive a Wisconsin Identity Protection PIN, enter both Wisconsin Identity Protection PINs in the spaces provided. For more information, see our Wisconsin Identity Protection PIN common questions at [revenue.wi.gov/Pages/FAQS/IP-PIN.aspx](https://revenue.wi.gov/Pages/FAQS/IP-PIN.aspx).

Age 65 or older? The **Property Tax Deferral Loan Program** can help pay your property taxes. See page 4 of Schedule H for more information.

### Applicable Laws and Rules

This document provides statements or interpretations of the following laws and regulations enacted as of October 2, 2023: Chapter 71, Wis. Stats.