



2019

Homestead or
Property Tax
Refund for
Homeowners

*For a fast refund,
file electronically!*

See back cover for details.

ksrevenue.org



- A Homestead Refund is a rebate on a portion of the property taxes paid on a Kansas resident's homestead.
- Refund is based on total household income.
- The maximum refund is \$700.



79-4501. Homestead property tax refund act; title and purpose of act. The title of this act shall be the homestead property tax refund act. The purpose of this act shall be to provide ad valorem tax refunds to: (a) Certain persons who are of qualifying age who own their homestead; (b) certain persons who have a disability, who own their homestead; and (c) certain persons other than persons included under the provisions of (a) or (b) who have low incomes and dependent children and own their homestead.

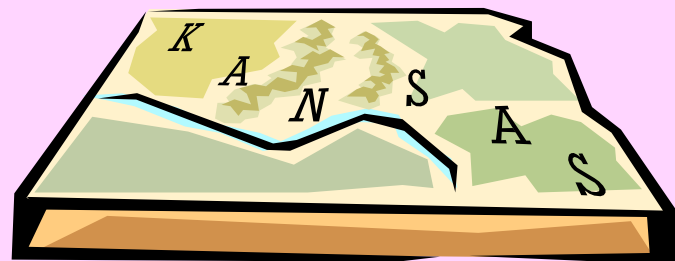
History: L. 1970, ch. 403, § 1; L. 1972, ch. 383, § 1; L. 1973, ch. 404, § 1; L. 1975, ch. 506, § 1; L. 1978, ch. 418, §1; L. 2001, ch. 57, § 1; L. 2012, ch. 135, § 30; Jan. 1, 2013

- A homestead is the house, mobile or manufactured home subject to property tax that you own and occupy as a residence.



To qualify, you must meet both of these requirements:

✓ A Kansas resident for the entire year.



✓ Total household income is under \$35,700.



You must also meet one of the following requirements:

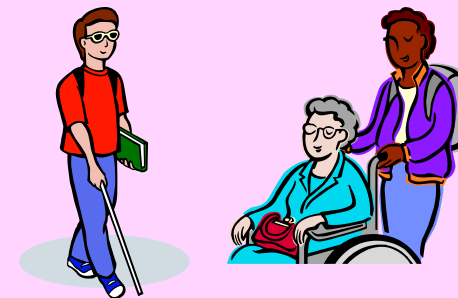
- ✓ Age 55 or older for the entire year
(born before 1/1/1964), OR



- ✓ Have a dependent child under 18 years of age that lived with you the entire year
(Must be born before January 1, 2019, and was under the age of 18 all of 2019). OR



- ✓ Blind or totally and permanently disabled for the entire year, OR



Veterans Disability Eligibility Include:

✓ Disabled Veterans

- Kansas resident 100% of the year.
- Honorably discharged from active duty.
 - Certified to have **50%** or more permanent disability:
 - sustained through military action,
 - due to an accident while on active duty,
 - or resulting from disease contracted while on active duty.



&

✓ Surviving Spouses of disabled veterans - would continue to remain eligible until such time as they remarry.

&

✓ Surviving Spouses of active duty military personnel who died in the line of duty - would continue to remain eligible until such time as they remarry.

- ✓ Claimants are to include only 50% of Social Security, and Supplemental Security Income (SSI) benefits, including Medicare deductions, they received in 2019. As in prior years, Social Security, SSI, Veterans and Railroad disability payments are NOT included in *Household Income*.



**SOCIAL SECURITY DISABILITY
PAYMENTS GRANDFATHERED**

- ✓ Persons receiving social security disability payments prior to attaining full retirement age will be able to continue to exclude all Social Security payments received after obtaining full retirement age – from Household Income.

Refund Qualifications Members of Household

- ✓ A person owning or occupying a homestead, that is not rental property, with an appraised valuation for property tax purposes that exceeds \$350,000 does **NOT** qualify for a homestead refund.



- ✓ If a Homestead claimant **owes property tax** to the County Treasurer, their **Entire refund will be sent directly to the County Treasurer.**



When:

- After December 31, 2019.
- On or before April 15, 2020.

Where:

Homestead Claim

Kansas Department of Revenue

PO Box 750680

Topeka, KS 66675-0680



- ✓ If filing on behalf of a claimant who died during 2019, the *refund* amount (*Line 15 of the K40H*) is *prorated* based on the decedent's date of death. If the claimant was a homeowner, the *taxes* (*Line 11 of the K40H*) are also *prorated* based on the decedent's date of death.

<u>MONTH</u>	<u>PERCENTAGE</u>	<u>MONTH</u>	<u>PERCENTAGE</u>	<u>MONTH</u>	<u>PERCENTAGE</u>
January	.083	May	.417	September	.750
February	.167	June	.500	October	.833
March	.250	July	.583	November	.917
April	.333	August	.667	December	1.000

- ✓ **BETTER YET...** If claimant qualifies for a Homestead Refund themselves, file a homestead return under the claimant's name instead of under the decedent's name so they may receive a greater Refund.

Refund
Qualifications
Members of Household

**SAFE SENIOR
PROPERTY TAX RELIEF CLAIM
K-40PT**

- ✓ The Safe Senior claim is a refund for low income seniors of property taxes actually and **Timely** paid on real or personal property used as their principal place of residence.
- ✓ The Safe Senior claim is a possible alternative to the Homestead Claim and it is administered under the Kansas Homestead Act (property tax refund).

- ✓ Must have been a resident of Kansas the entire year of 2019.
- ✓ Must be a homeowner **(No Renters)**
- ✓ A person with a homestead with an appraised valuation for property tax purposes that exceeds \$350,000 does **NOT** qualify for the Safe Senior Refund.
- ✓ Household Income must be **\$20,300** or less for 2019.
(120% of Poverty Guidelines for 48 contiguous states and DC for 2 people. \$16,910 for 2019)
- ✓ Must have been age 65 or older for the **Entire year**.
- ✓ Must **NOT** have Delinquent property taxes.
- ✓ Either a Homestead or a Safe Senior may be claimed, **NOT BOTH.**

- ✓ Household income for the Safe Senior Refund is the as the Homestead Refund except Social Security is counted at **100%** unlike Homestead that counts only 50%.
- ✓ Excluded Income for the Safe Senior Refund is the same as the Excluded income for the Homestead Refund.



Refund Advancement Program

- ✓ Optional
- ✓ Uses Homestead refund to pay the first half of upcoming property tax
- ✓ KDOR sends a letter of eligibility in Nov. to those who requested to participate and qualify
- ✓ Form ELG is completed by the county clerk

- This program provides eligible homeowners with the opportunity to apply a portion of their anticipated Homestead refund to help pay the first half of their property tax. (December 2019)
- There is a question on Form K-40H asking the homeowner whether they want their next year's homestead advancement sent directly to their County Treasurer. If the box is checked on the 2019 K-40H, the 2020 homestead advancement will be sent directly from Kansas Department of Revenue to the County Treasurer. This eliminates the need for the homestead claimant to physically deliver the homestead eligibility letter to the County Treasurer.
- If you do not check this box, you cannot participate in the homestead advancement program, and none of your homestead refund will be used to pay your 2020 property taxes.

*** IMPORTANT ***

A Homestead or SAFESR property tax refund claim must be completed before April 15, 2020 to payback the Homestead or SAFESR property tax refund you elected to be advanced or paid to the county by KDOR on your behalf and applied toward the 1st half of your 2019 property taxes that are (were) due December 20, 2019.

Household Income

Signature

Excluded Income

Owner Statements

Members of Household
Qualifications
Refund

Safe SeniorHomestead

✓ Max Refund	75% of Property Tax Timely Paid	\$700
✓ Max Household Income	\$20,300	\$35,700
✓ “Regular” Social Security Included as income	100%	50%
✓ Allow for Delinquent tax payments	No	Yes
✓ Participate in advancement	Yes	Yes
✓ Refund for Renters	No	No



Signature	<input type="checkbox"/>	I authorize the Director of Taxation or the Director's designee to discuss my K-40H and enclosures with my preparer.		
	I declare under the penalties of perjury that to the best of my knowledge and belief, this is a true, correct and complete claim.			
	John L. Smith		Don Livingston	
	Claimant's signature	Date	Signature of preparer other than claimant	Preparer's phone number

IMPORTANT: Please allow 20 to 24 to process your refund.

The claimant **MUST** sign the completed form. If the form was prepared by another, the preparer should also sign the form.

Preparer Authorization Checkbox

Checking this box authorizes the director or the director's designee to discuss your Homestead claim and any enclosures with your preparer.

- ✓ **Your refund amount from your original 2018 Homestead claim; (*not amended*)**
- ✓ **Your banking information if you would like to have your refund directly deposited into your bank account;**
- ✓ **All information regarding any Household Income. Examples are:**
 - ✓ taxable & nontaxable wages, salaries, self employment, Interest and dividends, earned income credit, social security, SSI benefits, disability payments, any retirement benefits, unemployment, alimony, welfare and temporary assistance payments, foster home care payments, gambling winnings, jury duty payments, etc.
- ✓ **All Household members' personal information such as name, social security number, date of birth, etc.**

- ❖ If the filer submitted a claim last year, enter the Social Security Number and the amount of last year's refund or
- ❖ Contact the KDOR Electronic Services for an access code at 785-368-8222 option 4 or email kdor_TAC@ks.gov.

[Kansas.gov](#) | [State Phone Directory](#) | [Online Services](#)



Kansas Department of Revenue Homestead Refund Claim

[KDOR Web Site](#)

[Kansas Web Site](#)

[Home](#)

[Contact Us](#)

Login

To login, enter your Social Security Number (SSN) and your Access Code or the amount of last year's refund.

If this is your first time applying for the Homestead Refund Claim online or you did not file for a Homestead Refund Claim last year, please [set up an account](#).

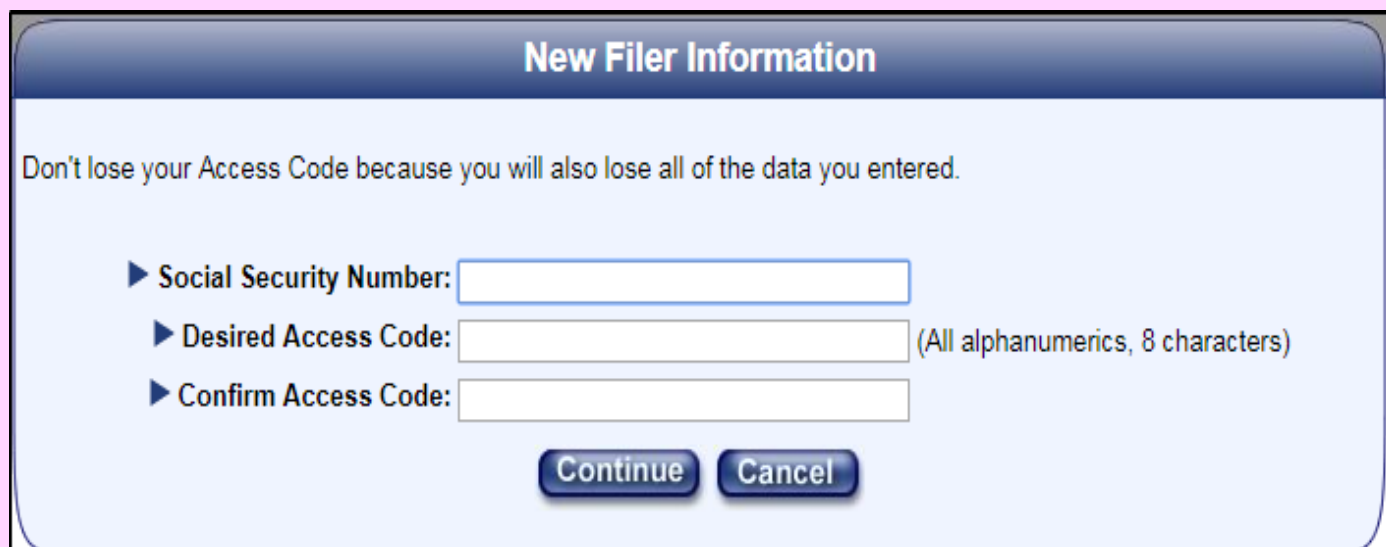
If you need further assistance, please contact the KDOR Electronic Services unit at 785-368-8222 Option 4 or by email at KDOR_TAC@ks.gov.

Social Security
Number:

Enter your last year's
Homestead refund
amount or 8 digit
Access Code:

Login

If the filer did not submit a claim the previous tax year, select “set up an account”. This will allow them to create their own access code.



New Filer Information

Don't lose your Access Code because you will also lose all of the data you entered.

▶ Social Security Number:

▶ Desired Access Code: (All alphanumerics, 8 characters)

▶ Confirm Access Code:

Select the type of claim you are filing:
Original or Amended

The screenshot shows a web interface titled "Original or Amended Claim". It features three buttons in the center: "File an Original Claim", "File an Amended Claim", and "Log Off". On the right side, there are two tabs: "Instructions" (selected) and "Help". Below the "Instructions" tab, the heading "Instructions" is followed by two paragraphs of text. The first paragraph states: "Select 'File an Original Claim' if you have not submitted a Homestead application for the current tax year through WebFile or using any other filing method." The second paragraph states: "Select 'File an Amended Claim' to complete your amended filing even if your original claim was filed on paper or using another E-File application."

Original or Amended Claim

File an Original Claim

File an Amended Claim

Log Off

Instructions Help

Instructions

Select 'File an Original Claim' if you have not submitted a Homestead application for the current tax year through WebFile or using any other filing method.

Select 'File an Amended Claim' to complete your amended filing even if your original claim was filed on paper or using another E-File application.

Personal

Qualifications

Income

Owner Refund

Household

Refund Total

Summary

Personal Information

Please enter the info below. If you are changing your address, please check the "Change of Name and/or Address" checkbox below. Required fields are marked with an arrow ▶.

Social Security Number: XXX-XX-2121

▶ First Name:

Middle Initial:

▶ Last Name:

▶ Home Address:

▶ Zip Code:

▶ City:

-- Select City -- ▼

State:

KS

▶ County:

-- Select County -- ▼

Phone:

(XXXXXXXXXXXX or XXX-XXX-XXXX)

KS Driver's License Number or
KS State ID Number:

Email:

Change of Name and/or
Address:

☐

Continue

Log Off

Qualifications

To qualify for a Homestead refund you must declare the claimant's eligibility by selecting all of the below that apply to the claimant.

Deceased:

☐

?

Date Deceased:

(MM/DD/YYYY)

Are you a Kansas Resident?

No

?

Do you own your home?

No

?

55 or older for all of 2019

☐

?

Date of Birth:

(MM/DD/YYYY)

Disabled and/or Blind:

☐

?

Date of Disability:

(MM/DD/YYYY)

Mark this box if you are filing as
surviving spouse of a disabled
veteran OR of an active duty
service member who died in the
line of duty

☐

?

Dependent Child:

☐

?

First Name of Dependent Child:

Last Name of Dependent Child:

Date of Dependent Child's Birth:

(MM/DD/YYYY)

Continue

Log Off

Income

Included Income

Income Total

Excluded Income

Please enter the info below.

Wages or KAGI:

?

FEIC:

?

Other Taxable Income:

?

SS or SSI Income:

100%

?

RR and Other Pensions:

?

TAF and Other:

?

All Other Income:

?

Continue

Log Off

- Wages or KAGI
- FEIC
- taxable interest
- Dividend income
- Unemployment
- self-employment income
- business or farm income
- alimony received
- rental or partnership income
- gain from business or investment property sales
- long term capital gains included in FAGI
- Social Security and Supplemental Security Income (Enter 100%)
- Railroad, VA, KPERS other retirement income.
- Temporary Assistance to Families (TAF)
- Welfare or general assistance
- Worker's compensation
- Grants and scholarships
- foster grandparent payments.

Income

[Included Income](#)[Income Total](#)[Excluded Income](#)

This is your Total Household Income that was received during the 2019 tax year. If you do not think this is correct, select the "Included Income" tab to return to the previous page to look at the amounts you entered

Total Income: \$2,600

[Continue](#)[Log Off](#)

Income

Included IncomeIncome TotalExcluded Income

Please enter the info below.

Food Stamps:

?

Child Support:

?

Loans:

?

Nongovernmental Gifts:

?

Settlements:

?

Disability:

?

Other Source:

?

(enter source, not amount)

Other Amount:

?

(from source above)

Continue

Log Off

- Food Stamps
- Child Support
- Personal Loans
- Nongovernmental Gifts
- Settlements
- Disability

Homeowner Refund

Please enter the info below. Required fields are marked with an arrow ▶.

▶ Total Property Tax:

?

Enter your general property tax amount excluding specials.
(Tax on property valued at more than \$350,000 does not qualify)

Are there any Delinquent
Property Taxes?:

No ▼

?

Percent of the homestead
property that was rented or used

?

For business In 2019:

Continue

Log Off

Personal

Qualifications

Income

Owner Refund

Household

Refund Total

Summary

Members of Household List

Complete a list of ALL persons who lived in your household(s) at any time during 2019. The claimant will already be Listed if you had a dependent child that you listed while doing the "Qualification" page, then they will also already be listed "Add" any additional members of your household including all adults and children who lived with you at any time in 2019.

Name	Relationship	Status	Action
John Doe	Claimant		Edit

Add

Continue

Log Off

Add Member of Household

Please enter the info below. Required fields are marked with an arrow ▶.

▶ First Name:

▶ Last Name:

▶ Date of Birth:

(MM/DD/YYYY)

▶ Relationship to Claimant:

?

Dependent?:

☐

?

▶ Months in Household:

?

▶ Income:

?

▶ Is the income amount

included in the Income already

entered per the Income tab?

▶ Social Security Number:

Continue

Cancel

Personal

Qualifications

Income

Owner Refund

Household

Refund Total

Summary

Refund Total

This is your calculated claim amount.

Total Income: \$2,600

Total Property Tax: \$2,000

Total : \$700

Refund Percentage : 100%

K40H Refund Amount: \$700

Participation in Refund ☐ Yes ☒ No [?](#)

Advancement Program:

Continue

Log Off

[Home](#)[Contact Us](#)

PersonalQualificationsIncomeOwner RefundHouseholdRefund TotalSummary

Refund Total

This is your calculated claim amount.

Total Property Tax: \$1,379

Refund Percentage : 75%

K40PT Refund Amount: \$1,034

Participation in Refund No Advancement Program:

If Homeowner qualified for a K40PT Refund, this tab will say "K40PT Refund Amount". If not, it will say "K40H Refund Amount".

InstructionsHelp

Instructions

You will be issued a claim for the amount listed on this page if:

- There are no corrections made to your claim, and
- As a homeowner, you did not participate in the optional refund advancement program; and
- You have no delinquent property taxes due to your County Treasurer; and
- You owe no other debt to the State of Kansas.

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Summary

Any sections of your claim that have not been properly completed are marked with an "incomplete" icon, ❌. Selecting the "Edit" link will display a list of errors associated with that section and give you a chance to correct them. You will not be able to continue past this page unless all sections are marked with the "Complete" icon, ✅.

Section	Status	Action
Personal Information	✅	Edit
Qualifications	✅	Edit
Income	✅	Edit
Homeowner Refund	✅	Edit
Household	✅	Edit
Refund Total	✅	Edit

View Claim

Continue

Log Off

Signature

Please enter the info below. Required fields are marked with an arrow ▶.

Discuss With Preparer: ☐ ?

Preparer Name:

Preparer Phone: (XXX-XXX-XXXX)

Preparer Identification
Number:

Preparer Email Address:

I declare under the penalties of perjury that to the best of my knowledge and belief this is a true, correct, and complete return.

▶ Claimant's Name: (Enter full name)

▶ Acknowledge ☐
Signature:

Refund Method

If you have chosen to participate in the "Refund Advancement Program" and your refund amount is more than your Property Tax due, the Kansas Department of Revenue needs to know your preferred refund method for the remainder due to you. Please select a method below. Required fields are marked with an arrow ►.

► Refund Method: ?

Will you deposit your refund to a ☐
Prepaid Debit Card / Cash Card?

If so, check the box:

Continue

Cancel

Log Off

Direct Deposit

Please enter the info below. Required fields are marked with an arrow ▶.

▶ Routing Number:

?

▶ Verify Routing Number:

▶ Account Number:

?

▶ Verify Account Number:

▶ Account Type:

Checking ▼

Continue

Cancel

Log Off

**The claim has been filed.
A Confirmation Number will be provided.
You may View Claim, Print or Log Off.**

Confirmation

Here is your confirmation information. Please print this page for your records.

Confirmation Number: 722300002

[View Claim](#)[Print](#)[Log Off](#)

✓ **Electronic Services:**

Phone: 1(785)368-8222 option 4

Email: KDOR_TAC@ks.gov

✓ **Carl York**

Phone: (785) 296-1048

Email: carl.york@ks.gov

✓ **Taxpayer Advocate**

Bob Clelland

Phone: (785) 296-2473

Email: Bob.Clelland@ks.gov

Ad Astra Per Aspera



"to the stars
through
difficulties."