PTAX-342 Application for Disabled Veterans' Standard Homestead Exemption (DVSHE)

Step 1: Complete the following information

1. Property owner's name
   
   Street address of homestead property
   
   City State Zip
   
   ( ) Daytime phone

Send notice to (if different than above)

2. Name
   
   Mailing address
   
   City State Zip
   
   ( ) Daytime phone

3. Write the assessment year for which you are filing this form.
   
   Year

4. On January 1, were you liable for the payment of real estate taxes on this property?
   
   Yes No

5. Check your type of residence.
   
   Single-family dwelling Duplex
   
   Townhouse Condominium
   
   Other

6. Write the property index number (PIN) of the property for which you are requesting the DVSHE. Your PIN is listed on your property tax bill or you may obtain it from the Chief County Assessment Officer (CCAO).
   
   PIN
   
   a. PIN
   
   b. Write the legal description only if you are unable to obtain your PIN. (Attach a separate sheet if needed.)

7. On January 1, did you occupy this property as your principal residence?
   
   Yes No

8. On January 1, was any portion of the property used for commercial purposes or rented to another person or entity for more than 6 months?
   
   Yes No

9. On January 1, were you a resident of a facility licensed under the Nursing Home Care Act or operated by the U.S. Department of Veterans' Affairs?
   
   Yes No

   If "Yes," complete Lines a through c.
   
   a. Write the name and address of the facility.

   b. Was your property occupied by your spouse? Yes No

   c. Did your property remain unoccupied? Yes No

Step 2: Complete the disabled veterans' eligibility information

10. Are you an Illinois resident? Yes No

11. Are you a veteran or the un-remarried surviving spouse of a disabled veteran who served as a member of the U.S. Armed Forces on active duty or state active duty, Illinois National Guard, or U.S. Reserve Forces? Yes No

Note: You must provide documentation. See "Do I need to provide documentation?" on the back of this form.

Step 3: Complete the following information

12. Are you a veteran or the un-remarried surviving spouse of a veteran with a service-connected disability as certified by the U.S. Department of Veterans' Affairs? Yes No

13. If you are the surviving spouse, were you remarried as of January 1? Yes No

14. If you are claiming the DVSHE on this property for the first time, check the type of documentation you are attaching as proof that you have a legal or beneficial title to the property.

   □ Deed
   □ Contract for deed
   □ Trust agreement
   □ Other written instrument
   □ Lease

   Specify

   a. Write the date the written instrument was executed.
      
      Month Day Year

   b. If the instrument is recorded, complete the information below.
      
      Recorded document number
      
      Date document recorded Month Day Year

Step 4: Sign below

I state that to the best of my knowledge, the information on this application is true, correct, and complete.

Property owner's or authorized representative's signature

Month Day Year

PTAX-342 (R-8/13)
Form PTAX-342 General Information

What is the Disabled Veterans’ Standard Homestead Exemption (DVSHW)?
The Disabled Veterans’ Standard Homestead Exemption (35 ILCS 200/15-169) provides an annual reduction in the equalized assessed value (EAV) of a primary residence occupied by a disabled veteran on January 1 of the assessment year. The DVSHW amount depends on the percentage of the service-connected disability as certified by the U.S. Department of Veterans’ Affairs. A disabled veteran who is at least 70% service-connected disability will receive a $5,000 reduction in property’s EAV. A disabled veteran with at least 60%, but less than 70% service-connected disability, will receive a $2,500 reduction in property’s EAV.

Who is eligible?
To qualify for the DVSHW, the disabled veteran must:
- be an Illinois resident who served as a member of the U.S. Armed Forces on active duty or state active duty, Illinois National Guard, or U.S. Reserve Forces, and who has an honorable discharge;
- have at least a 50 percent service-connected disability certified by the U.S. Department of Veterans’ Affairs; and
- own and occupy the property as the primary residence on January 1 of the assessment year or lease and occupy a single family residence on January 1 of the assessment year and be liable for the payment of the property taxes to the county.

Note: The property's total EAV must be less than $250,000 after subtracting any portion used for commercial purposes. "Commercial purposes" include any portion of the property rented for more than 6 months.

If you previously received the DVSHW and now reside in a facility licensed under the Nursing Home Care Act or operated by the U.S. Department of Veterans' Affairs, you are still eligible to receive the DVSHW provided your property:
- is occupied by your spouse; or
- remains unoccupied during the assessment year.

Is a surviving spouse eligible?
An un-remarried surviving spouse of a disabled veteran can continue to receive the DVSHW on his or her spouse's primary residence or transfer the DVSHW to another primary residence after the disabled veteran's original primary residence is sold, provided the DVSHW had previously been granted to the disabled veteran. An un-remarried surviving spouse must occupy and hold legal or beneficial title to the primary residence on January 1 of the assessment year.

Do I need to provide documentation?
Your Chief County Assessment Officer (CCAO) will require documentation to verify your eligibility for the DVSHW. You must provide a disability award or verification letter from the U.S.

Date received: ______/_____/______

☐ Verify proof of eligibility

Exemption amount
☐ $2,500  ☐ $5,000

Assessment Information

<table>
<thead>
<tr>
<th>Assessment Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>EAV of improvements</td>
<td>$</td>
</tr>
<tr>
<td>EAV of land</td>
<td>$</td>
</tr>
<tr>
<td>Total EAV of improvement/land</td>
<td>$</td>
</tr>
<tr>
<td>EAV commercial/rented property</td>
<td>$</td>
</tr>
<tr>
<td>Total EAV minus commercial/rented EAV</td>
<td>$</td>
</tr>
</tbody>
</table>

Note: An EAV of $250,000 or more, excluding commercial property or portion of the property rented for more than 6 months, does not qualify for DVSHW. For tax years 2007, 2008, and 2009, a $5,000 exemption required at least a 75 percent service-connected disability and a $2,500 exemption required a 50 percent to 74 percent service-connected disability.

Department of Veterans’ Affairs for the current assessment year and one of the following documents that is the original or a copy certified by the county recorder, recorder of deeds, Illinois Department of Veterans’ Affairs, or the National Archives Record Center:
- Form DD 214 or separation of service from the War Department (military service prior to 1950); or
- Certification of Military Service Form.

You can call the U.S. Department of Veterans’ Affairs at 1-800-827-1000 (options 1, 1, and 0) to request a verification letter that specifies your “service-connected disability rating.” Any other rating is not valid.

An un-remarried surviving spouse of a disabled veteran applying for the first time or transferring the DVSHW to a new primary residence must also provide the disabled veteran's marriage and death certificates and proof of ownership.

When will I receive my exemption?
The year you apply for the DVSHW is referred to as the assessment year. The county board of review, while in session for the assessment year, has the final authority to grant your DVSHW. If granted, your DVSHW will be applied to the property tax bill paid the year following the assessment year.

When and where do I file my Form PTAX-342?
You (including an un-remarried surviving spouse applying for the first time or for a new primary residence) should file your Form PTAX-342 with your CCAO by the due date to receive this exemption. Contact your CCAO at the address and phone number below for assistance and filing information with your county.

Note: To continue receiving the DVSHW on your residence, you must file Form PTAX-342-R, Annual Verification of Eligibility for Disabled Veterans’ Standard Homestead Exemption, each year with your CCAO.

Cindy A. Shaw
121 E. Washington Street ~ Suite 1
Pittsfield, IL 62363

If you have any questions, call (217) 285-2382

Are there other homestead exemptions available for a person with a disability?
Yes. However, only one of the following homestead exemptions may be claimed on your property for a single assessment year:

- Disabled Veterans’ Homestead Exemption
- Homestead Exemption for Persons with Disabilities
- Disabled Veterans’ Standard Homestead Exemption

Official use. Do not write in this space.

Board of review action date: ______/_____/______

☐ Approved
☐ Denied

Reason for denial

Comments: