

HRA PROGRAM CHANGES FOR THE 2005 CLAIM YEAR AND MAILING OF EXEMPT PROPERTY LETTERS

PURPOSE OF BULLETIN To advise staff of changes to the Homeowner and Renter Assistance Program for the 2005 claim year.

INCOME LIMITATION INCREASE The total household income limitation for the 2004 calendar year is increased to \$39,699.

The gross household income limitation for the 2004 calendar year is increased to \$72,179.

NOTE: The maximum amount of homeowner or renter assistance is unchanged from the 2004 claim year:

- \$472.60 for homeowner assistance
 - \$347.50 for renter assistance
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WHEN ARE FORMS BEING MAILED? Direct mailing of the 2005 HRA Booklets to claimants who filed last year will begin June 16, 2005. Claimants should receive their booklets by July 1, 2005.

HRA CLAIM FORM CHANGES For the 2005 claim year:

- We no longer accept the Affidavit of Doctor or a physician's letter as proof of disability.
- The Penalty of Perjury section (Step 9), now informs claimants that by signing the claim, they are authorizing FTB to mail their assistance payment to the address listed in Step 1.
- Claimants are instructed to use the net value as shown on their 2004/2005 property tax bills (previously full value).
- We now request a copy of the death certificate if the date of death is on or after January 2, 2005.
- NOL carryover and carryback are now included on the list of items that cannot be subtracted from household income.
- A "Reply By" date will now be included on letters sent to claimants requesting additional information.
- Per SB 25, letters issued from the mainframe will no longer use a Social Security number. The ability to access HRA accounts by DLN will be developed

WHERE TO
GET FORMS
AND
PUBLICATIONS

Beginning June 16, 2005, HRA forms and publications are available through the:

- FTB Internet Website at www.ftb.ca.gov (for forms only - go to *Forms and Publications*).
- HRA Web page on the FTB Website (for forms **and** information): <http://www.ftb.ca.gov/individuals/hra/forms.html>.
- Interactive Voice Response (IVR) System.
- Forms Request System (also known as WHLB).

AUTOMATED
TELEPHONE
NUMBER

Beginning June 16, 2005, claimants can use the automated telephone number, (800) 868-4171, to:

- Order 2005 claim year HRA forms.
- Hear answers to Frequently Asked Questions (FAQs).
- Beginning July 1, 2005, claimants can use the automated number to check the status of their **current year** claims.

EXEMPT
PROPERTY
LETTER

On June 22, 2005, we will mail approximately 500 exempt property letters to building owners and property managers of property that we have identified as being exempt from property tax. The letters indicate that California Homeowner and Renter assistance is not available to individuals who live on property that is exempt from paying property taxes.

For more details see Attachment 1.

ATTACHMENT 1 - EXEMPT PROPERTY LETTER



STATE OF CALIFORNIA
FRANCHISE TAX BOARD
Homeowner and Renter Assistance Program
PO Box 942886
Sacramento CA 94286-0940
Telephone (800) 868-4171

Date:

Building Owner/Property Manager

California Homeowner and Renter assistance is not available to individuals who live in property that is exempt from paying property taxes. The property location shown below is exempt from property tax according to information that we obtained from your County Assessor. If this information is incorrect, or if there is another address used for this parcel, please notify the Franchise Tax Board.

If there are renters living at this address, please post this notice on the property in an area where it can be seen by all residents. If no renters are living at this address, please disregard this notice.

Qualified Rented Residence Defined: To be considered a qualified rented residence, the assessed owner of the residence must pay general property taxes, which is usually 1% of the full-assessed value of property **before** any exemptions are applied.

NOTICE TO TENANTS

THE PROPERTY LOCATION SHOWN ABOVE IS EXEMPT FROM PROPERTY TAX ACCORDING TO INFORMATION THAT WE OBTAINED FROM YOUR COUNTY ASSESSOR. INDIVIDUALS LIVING ON THIS PROPERTY FOR THE ENTIRE YEAR OF 2004 ARE NOT ELIGIBLE FOR 2005 HOMEOWNER OR RENTER ASSISTANCE. THOSE LIVING AT THIS ADDRESS FOR PART OF 2004 CANNOT CLAIM RENTER ASSISTANCE FOR THE MONTHS THEY LIVED HERE.