



# Media Host Guide

## Homeowner and Renter Assistance Program

**2007**

### ***Introduction***

The Franchise Tax Board administers the Homeowner and Renter Assistance (HRA) Program that provides a once-a-year state payment of up to \$473 to eligible individuals. This program benefits seniors, 62 years of age or older, and disabled or blind individuals, regardless of age, whose total annual household income was not more than \$42,770 in 2006. The program is based on property taxes paid directly by homeowners and indirectly by renters. Qualified homeowners may receive up to \$473 and qualified renters may receive up to \$348.

As part of our on-going public education program, we assembled this guide to help you in planning your program. Feel free to use it in its entirety or modify it to fit your needs. We appreciate your support in helping us get this information to the people in your community who need it.

**California Franchise Tax Board  
Public Affairs Office  
Phone (916) 845-4800  
Fax (916) 845-3800**

# Host Guide

## Frequently Asked Questions

We provide the following questions to assist you in planning your interview. Feel free to use these questions, or choose some of your own. These questions are among the most frequently asked by the public.

### Q. What is the Homeowner and Renter Assistance Program?

The Homeowner and Renter Assistance program provides a once-a-year payment from the State of California based on income levels and property taxes paid by homeowners and indirectly paid by renters to qualified seniors, 62 years of age or older, and disabled or blind individuals, regardless of age.

### Q. What's new this year?

We are providing instructions for this program in Vietnamese and Russian in addition to English, Spanish, Chinese, and Korean. To get a translated copy, visit our Website at [ftb.ca.gov](http://ftb.ca.gov).

Also, this year's maximum household income level increased to \$42,770.

### Q. How much can a claimant receive?

Homeowners can receive \$20 to \$472.60.  
Renters can get \$15 to \$347.50.

Last year, this program paid more than \$180 million to more than 600,000 applicants.

### Q. Who qualifies for the program?

Claimants must:

- Be at least 62 years old, or blind, or disabled on December 31, 2006.
- Be a citizen, designated alien, or a qualified alien of the United States when the claim is filed.

- Have \$42,770 or less in total household income for the 2006 calendar year. Or, and this effects fewer people, have \$77,762 or less in gross household income in 2006.
- Have either owned and lived in their own home on December 31, 2006, or, lived in a qualified rented residence and paid \$50 or more for rent per month in 2006.

### Q. What is “total household income” and “gross household income”?

Total household income includes both taxable and certain nontaxable income you and your spouse received. Examples include: Social Security, interest, dividends, pensions, annuities, wages, alimony, veteran's benefits, aid to the blind and/or disabled, supplemental security income, rental income (or loss), business income (or loss), and gain (or loss) from sale of assets.

Gross household income is computed only if you had income from rental property and/or from a business.

Most people do not have to worry about gross household income. However, it is total household income plus all noncash business expenses such as depreciation, amortization, and depletion.

## **Q. How do I file a claim?**

Our Website has forms that have ‘*math assistance*’ that make filing easy. You can fill out the form online, then print and mail it to us.

You can also download the form, complete it, and mail it in. The two-page form takes just minutes to fill out. Be sure to have all of your 2006 income records. If you are a homeowner, you will also need a copy of your 2006/2007 property tax bill.

Be sure you review your claim form to make sure it is complete and correct, and attach copies of required documents. If the required documents are missing, your check may be delayed.

Examples of required documents include:

- Proof of age\* (required for the first year you file as 62 or older).
- Proof of blindness\* (required for the first year you file as blind).
- Proof of disability\* (required each year you file as disabled. If you are permanently disabled, it is required only for the first year you file as disabled).
- A Veterans Affairs letter that documents 100% total, permanent disability for VA purposes is now accepted as proof of disability.

Note: You must send proof of blindness only for the first year you file your claim. Provide a statement of blindness signed by a registered optometrist or physician on the doctor's letterhead verifying that you have sharpness of vision of 20/200 or less in the better eye with the use of a correcting lens, or tunnel vision (a limited visual field of no more than 20 degrees). The statement must also include the date when you became blind.

\*If you receive Supplemental Security Income (SSI), you do not need to send proof of age, blindness, or disability.

## **Q. When should I file my claim?**

Now. The normal filing period is July 2, 2007, through October 15, 2007. Free assistance is offered at volunteer sites.

We advise claimants to file earlier rather than later. We have fewer program staff after October 16, 2007 to process your claim.

## **Q. If I'm married, can both of us file a claim?**

You may file only one claim per household each year. Only one owner-claimant is entitled to payment each year. When married couples are members of the same household and they both meet the qualifications for assistance, only one person should file the claim.

## **Q. What is a qualified home or rented residence?**

A qualified home must be your principal place of residence located in California and may include:

- Single family dwellings.
- Your own condominium.
- “Own-your-own” apartment.
- Mobile or manufactured homes.
- Floating home or houseboat.

If you paid a vehicle-type tax on your mobile home to the Department of Housing and Community Development, you may file either as a renter or as a homeowner, but not both.

A qualified rented residence must be your principal place of residence, located in California. Your landlord must pay property tax on the rented residence or amounts in lieu of property tax.

A qualified rented residence may include:

- Single family dwellings.
- Apartments.
- Hotel rooms.
- Mobile homes.

- Boarding houses.
- Duplexes.
- Flats.
- Floating homes.

### **Q. What if I did not get a booklet?**

If you qualify and did not receive a booklet, you can request one by phone by calling our automated phone number at (800) 868-4171. You can also get one from our Website at [www.ftb.ca.gov](http://www.ftb.ca.gov).

The FTB mailed more than 592,000 HRA booklets to previous year claimants. (Renters - 451,000 and Homeowners - 141,000.)

### **Q. Can I file for past years?**

In general, your claim must be filed by June 30 of the following calendar year. For example, your claim for the 2007-year must be filed by June 30, 2008. However, if you were medically incapacitated you have more time to file.

If that is the case, you can file a claim within six months of your recovery. However, you must file the claim within three years from the end of the June 30 fiscal year for the year you wish to claim assistance: for claim year 2006, you would need to file by June 30, 2009. There is no other exception that allows you to file a claim for past years.

### **Q. What is the Property Tax Postponement Program?**

The State Controller administers a program that provides property tax relief to many of the same people that qualify for the FTB's HRA Program. The Property Tax Postponement Program allows eligible homeowners to *postpone* payment of part or all of the property taxes on their residence.

For more information, check the Controller's Website at [sco.ca.gov](http://sco.ca.gov) or call (800) 952-5661.

### **Q. May I file for both programs?**

Absolutely! Although you will not receive a check, FTB's HRA program does still benefit you.

When you postpone your property taxes with the State Controller, a lien is filed on your property. If we grant your Homeowner Assistance claim, the amount reduces the balance due on the lien.

### **Q. Where can I get HRA help?**

We offer lots of help. You can get answers to your questions on our Website, through our automated toll-free phone line, or by visiting a volunteer site in your community.

#### ***Internet***

Visit FTB's Website at [ftb.ca.gov](http://ftb.ca.gov) to download forms and get answers to frequently asked questions. You can also access our statewide volunteer list to locate the nearest site.

#### ***Automated Phone Assistance***

Call FTB's automated phone service anytime at (800) 868-4171. You can get answers to frequently asked questions, order claim forms, and check the status of your claim.

#### ***HRA Volunteer Program***

The HRA Volunteer Assistance Program provides free help. Sites are located statewide and are staffed with trained volunteers who will complete claim forms, answer questions, or provide forms. Anyone interested can call their local Senior Citizens Information and Referral Center or your state legislator's office for the location and hours of the nearest site, or contact FTB.

# Quick Reference

## Franchise Tax Board

### Website

[www.ftb.ca.gov](http://www.ftb.ca.gov)

### Tax Assistance Phone Numbers

Claimants can refer to the back of their HRA booklets for instructions on using our automated telephone service.

### Toll-Free HRA Automated Telephone Service

(800) 868-4171

### Outside of the United States

(916) 845-6600

### Toll-Free General Telephone Service

(800) 852-5711

### For the hearing or speech impaired:

TTY/TDD (800) 822-6268  
Voice Phone (800) 735-2922

## State Controller's Office

State Controller  
Property Tax Postponement  
PO Box 942850  
Sacramento CA 94250-5872

### Website

[www.sco.ca.gov](http://www.sco.ca.gov)

### Toll-Free General Telephone Service

(800) 952-5661