

SAUCON VALLEY SCHOOL DISTRICT

PROPERTY TAX REBATE PROGRAM

QUESTION & ANSWER GUIDE

For Filing 2025-26 School District Property Tax Claims

Filing Window: July 6, 2026 – April 30, 2027

Q. Who is eligible to file a property tax rebate claim?

To qualify for a school district property tax rebate, you must meet **all** of the base requirements, plus **one** of the specific status criteria listed below:

Base Requirements:

- **Residency & Ownership:** You must have **owned and occupied a primary residence** ("homestead") within the Saucon Valley School District for the full period of time covered by the 2025-26 school tax.
- **Tax Payment:** You (or someone on your behalf) must have paid the 2025-26 school district real estate taxes on or before the date you file your rebate claim.
- **Income Limit:** Your total 2025 household income must be **\$35,000 or less**.

Status Criteria (You must meet at least ONE by December 31, 2025):

- You or your spouse were **65 years of age or older**.
- You were a **widow or widower** during all or part of 2025 and were **50 years of age or older**.
- You were **permanently disabled** during all or part of 2025, were **18 years of age or older**, and were unable to work due to a medically determined physical or mental impairment expected to continue indefinitely.

Note on Household Limits: Only one member of each household may file a claim per year. If two or more residents qualify, they must agree on who files; if they cannot agree, the rebate will be split equally (one-half each).

Q. How is "Household Income" calculated? What can I exclude?

"Household income" includes all income received by the claimant and all household members while residing in the homestead during the calendar year.

- **What to INCLUDE:** Gross social security/railroad retirement benefits, salaries, wages, bonuses, commissions, self-employment income, alimony, public assistance, pensions, annuities, unemployment, interest, realized capital gains, worker's compensation, and cash gifts exceeding \$300 in total value.
- **What to EXCLUDE:** You may **exclude 50%** of Federal Social Security benefits and **50%** of Railroad Retirement benefits. You may also exclude the first \$5,000 of death benefit payments, inheritance value, property tax/rent rebates, and personal injury damages.

Q. What is the maximum rebate amount I can receive?

The maximum rebate is **\$700**, but the actual amount depends entirely on your household income bracket. Furthermore, your local District rebate cannot exceed the remaining balance of your tax bill after your PA State rebate has been applied.

Your rebate will be calculated using the following schedule:

Total Household Income (From Line 13 of PA-1000)	Maximum District Rebate
\$0 to \$8,000	\$700
\$8,001 to \$15,000	\$550
\$15,001 to \$18,000	\$350
\$18,001 to \$35,000	\$300

Q. What documents must I attach to my application?

To process your claim, you must submit the following four documents:

1. **Form TRCF-1000:** The signed and dated Saucon Valley School District Rebate form.
2. **Form PA-1000:** A signed copy of your Pennsylvania State Property Tax Rebate form **filed for the year ending 2025**.
3. **Proof of State Rebate:** A copy of your PA State Rebate check (**dated July 2026 or later**), a bank statement confirming the direct deposit, or a letter from your state representative verifying receipt.
4. **Paid Tax Receipt:** A 2025-2026 School Real Estate Tax bill stamped "PAID" by the tax collector.

 **DO NOT INCLUDE:** Standard tax documents like W-2s, 1099s, or federal/state income tax returns are not required for submission. However, please retain these documents, as they may be requested if your application is selected for an audit.

Q. Can I file a claim for someone who has recently passed away?

- **Yes**, you may file a claim on behalf of an eligible individual who passed away **after December 31, 2025**. Please append "Estate of" before the claimant's name and include a copy of the death certificate.
- **No**, you may not file a claim if the individual passed away **during 2025**, as the law requires constant residency and ownership for the full tax year period.

Q. What happens if my claim is calculated incorrectly or denied?

- **Corrections:** If the Business Administrator finds an error, they will recalculate the correct rebate amount and send you a written notice explaining the change.
- **Appeals Process:** If your claim is denied, reduced, or adversely changed, you have the right to appeal. You must file a written **Petition for Redetermination** with the Board of School Directors within **ninety (90) days** of the date the notice was mailed. Your petition must explain the grounds for appeal and include a signed affidavit certifying that your facts are true.

Q. Are there penalties for submitting a fraudulent claim?

Yes. If a Form TRCF-1000 is discovered to be excessive and filed with fraudulent intent, the claim will be completely denied. If it has already been paid, a **25% penalty** will be applied, and the balance will accrue interest at a rate of **0.5% per month** until repaid.

Additionally, the claimant and anyone who assisted in preparing the fraudulent form may face misdemeanor charges, fines up to \$1,000, and up to one year of imprisonment. Claims will also be denied if property title was transferred strictly for the purpose of securing a rebate.

Q. Where can I get forms or speak with someone for assistance?

Application forms must be obtained directly from the school district or your local state representatives.

- **Saucon Valley School District Business Office**
Administration Building, 2097 Polk Valley Road, Hellertown, PA 18055 *Phone:* 610-838-7001
Ext. 1117 Email: Business.Office@SVPanthers.org *Hours:* Mon–Thu, 9:00 AM to 3:00 PM
Online: www.svpanthers.org (Departments > Business Administration > School Tax)
- **Representative Robert L. Freeman (136th District)**
215 Northampton Street, Easton, PA 18042 | *Phone:* 610-253-5543
- **Representative Milou Mackenzie (131st District)**
1425 Mountain Drive North, Bethlehem, PA 18015 | *Phone:* 610-965-5830

(Note: Staff members at both State Representatives' offices are fully available to assist residents in filling out these rebate applications free of charge.)