

## INSTRUCTIONS FOR COMPLETING CHANGE OF STATUS REPORT FOR SENIOR CITIZEN AND DISABLED PERSONS EXEMPTION

After the initial application is filed, a Change of Status Report must be filed with the county assessor between January 2 and December 31 if your income exceeds \$40,000 or your income has changed to place you in a different exemption category from that previously granted.

**The item numbers listed below relate to the numbered sections on the front of this form.**

1. **Name, Address, Parcel Number and Birth date(s)**: Enter the claimant name, address, telephone number, parcel number and birth date(s).
2. **Reason for changes**: Enter the reason for the Change in Status to the best of your knowledge.
3. **Income**: Eligibility in this program is determined by the estimated combined disposable income of the applicant during the application year. **Income verification is Required. The documentation given for verification will be shredded upon denial/approval.** All gross income from whatever source of the claimant, his or her spouse and any co-tenants must be reported. The actual amount expended for attendant care and medical aid may be deducted from veteran's and military benefits. Non-reimbursed nursing home expenses incurred by the claimant, his or her spouse or co-tenants may be deducted from gross income on line H. The non-reimbursed amounts paid for the care or treatment of claimant, his or her spouse or co-tenants in the home may be deducted from gross income on line I. In-home care or assistance means medical treatment or care received in the home; items such as food, oxygen, or meals on wheels, that are part of a necessary or appropriate in-home service; special needs furniture or attendant care and light housekeeping tasks. Payments for in-home care must be reasonable and at a rate comparable to those paid for similar services in the same area. The person providing the care or treatment does not have to be specially licensed. Non-reimbursed prescription drugs may be deducted from income on line J.

Co-tenant means a person who resides with the claimant and who jointly owns the residence.

If the person claiming the exemption was retired for two months or more of the preceding year, the income is calculated by multiplying the average monthly income (during the months such person was retired) by twelve.

If the income of the applicant is reduced for two or more months of the assessment year because of the death of their spouse, or when a substantial change in income occurs that will continue indefinitely, the income is calculated by multiplying the average monthly combined disposable income after the occurrences by twelve.

4. **Signature**: The claim may be signed by the applicant, by his/her attorney, by the holder of the mortgage or contract or any authorized agent of the claimant. The claim must be signed before a witness or in the presence of the assessor deputy.

### LEVELS OF EXEMPTION

#### Income

0 - \$30,000	Exempt from regular property taxes on the greater of \$60,000 or 60% of the valuation plus exemption from 100% of excess levies.
\$30,001 - \$35,000	Exempt from regular property taxes on the greater of \$50,000 or 35% of the valuation not to exceed \$70,000 plus exemption from 100% of excess levies.
\$35,001 - \$40,000	Exempt from 100% of excess levies.

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Title/Relationship if signed by person other than Claimant