

# 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  
IL

( ) \_\_\_\_\_  
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** Did you receive the DVSHE for the prior assessment year on this property?  Yes  No

**a** If "YES", check the amount of the DVSHE.  
 \$2,500 EAV reduction  \$5,000 EAV reduction

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

**6** Check your type of residence.  
 Single-family dwelling  Duplex  
 Townhouse  Condominium  
 Other \_\_\_\_\_

**7** 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).

**a** PIN \_\_\_\_\_

**b** Write the legal description only if you are unable to obtain your PIN. (Attach a separate sheet if needed.)  
\_\_\_\_\_  
\_\_\_\_\_

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

**a** If "No", write the date you first occupied this property (if applicable). \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Month Day Year

**9** 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

## 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

**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

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

## Step 3: Complete the following information

**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

**15** If you are the surviving spouse, are you claiming this exemption on your new primary residence for the first time?  Yes  No  
If "Yes", complete Lines a through c.

**a** Deceased disabled veteran's name \_\_\_\_\_ Date of death \_\_\_\_\_

**b** Did you sell your spouse's homestead property that received the DVSHE?  Yes  No

**c** Identify the disabled veteran's homestead property. You can obtain this information from the property tax bill or CCAO.

Property owner's name \_\_\_\_\_  
Street address of homestead property \_\_\_\_\_  
City State ZIP  
IL

PIN \_\_\_\_\_

If needed, attach a legal description of the property.

## 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

# Form PTAX-342 General Information

## What is the Disabled Veterans' Standard Homestead Exemption (DVSHE)?

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 DVSHE amount depends on the percentage of the service-connected disability as certified by the U.S. Department of Veterans' Affairs. A disabled veteran with at least a 75% service-connected disability will receive a \$5,000 reduction in property's EAV. A disabled veteran with at least 50%, but less than 75% service-connected disability will receive a \$2,500 reduction in property's EAV.

## Who is eligible?

To qualify for the DVSHE, 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 not dishonorably discharged.
- have at least a 50% 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.

## Is a surviving spouse eligible?

An **un-remarried** surviving spouse of a disabled veteran can continue to receive the DVSHE on his or her spouse's primary residence or transfer the DVSHE to another primary residence after the disabled veteran's original primary residence is sold, provided the DVSHE 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?

You must provide a disability award or verification letter from the U.S. 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 deed's, 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.

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

Your Chief County Assessment Officer (CCAO) will require documentation to verify your eligibility for the DVSHE.

## When will I receive my exemption?

The year you apply for the DVSHE 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 DVSHE. If granted, your DVSHE 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 to receive the DVSHE 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.

McHenry County, CCAO

2200 N Seminary Ste 106

Mailing address

Woodstock

IL 60098

City

ZIP

If you have any questions, call ( 815 ) 334 - 4290

## Are there other homestead exemptions available for disabled persons or disabled veterans?

**Yes.** However, only one of the following disabled homestead exemptions may be claimed on your property for a single assessment year:

- **Disabled Veterans' Homestead Exemption** - up to \$70,000 reduction in assessed value for federally-approved specially adapted housing. This exemption is administered by the Illinois Department of Veterans' Affairs. (35 ILCS 200/15-165);
- **Disabled Persons' Homestead Exemption** - annual \$2,000 reduction in property's EAV (35 ILCS 200/15-168); or
- **Disabled Veterans' Standard Homestead Exemption** - annual \$2,500 or \$5,000 reduction in property's EAV (35 ILCS 200/15-169).

Official use. Do not write in this space.

Date received: \_\_\_\_/\_\_\_\_/\_\_\_\_

Board of review action date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Verify proof of eligibility \_\_\_\_\_

- Approved  
 Denied

Exemption amount

\$2,500       \$5,000

## Assessment information

EAV of improvements \$ \_\_\_\_\_  
EAV of land \$ \_\_\_\_\_  
Total EAV of improvement/land \$ \_\_\_\_\_  
EAV commercial/rented property \$ \_\_\_\_\_  
Total EAV minus commercial/rented EAV \$ \_\_\_\_\_

Reason for denial \_\_\_\_\_

Comments: \_\_\_\_\_

**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 DVSHE.