



PHYSICIAN'S STATEMENT FOR DISABILITY HOMESTEAD EXEMPTION

INSTRUCTIONS: In lieu of supporting documentation from the Social Security Administration as evidence of disability, an applicant must provide a completed TAD Physician's Statement for Disability Homestead Exemption form along with a completed application for residential homestead exemption. The physician's statement must be completed within the past 12 months. Please read the reverse side of this form for more information and requirements for claiming the Disability Homestead Exemption.

PART A. To be completed by the APPLICANT.

Owner Name(s):
Mailing Address:
City, State, Zip:
Telephone: Email:
List the tax year(s) for which you are applying for the disability homestead exemption:

Table with 3 columns: Account Number, Property Address, Legal Description (if known)

PART B. To be completed by the PHYSICIAN.

DEFINITION OF DISABILITY

Disability for the purpose of the exemption means that:

- (a) A person is unable to engage in any substantial gainful activity by reason of any medically determinable physical or mental impairment which can be expected to result in death, or which has lasted or can be expected to last for a continuous period of not less than 12 months; or
(b) A blind person over the age of 55 and due to blindness is unable to engage in substantial gainful activity in which he has previously engaged with some regularity and over a substantial period of time.

Please answer the following questions.

On what date did this disability occur?
How long have you treated the applicant for the disabling condition?
When was the last date of examination?
When did the applicant last work?
When do you expect the applicant to be able to return to work?

Verification of Disability Statement

My name is
and I am a physician currently licensed to practice in the state of Texas. I am personally knowledgeable of the type and extent of medical disability that currently affects the applicant and have treated or examined this person's condition.

This disability prevents the applicant from engaging in any substantial, gainful activity and has lasted for or is expected to last at least 12 months or result in death. Yes No

This person is 55 years of age or older, is legally blind, and is unable to engage in his/her previous occupation because of the blindness. Yes No

Physician's Signature Physician's Medical License Number Date

Office Address:
Office Phone:

For Assistance: Please read the reverse side of this document or call (817) 284-4063.
Return completed form to: Tarrant Appraisal District, Attn: Exemptions, 2500 Handley-Ederville Road, Fort Worth, TX 76118-6909

## **Disability Homestead Exemption: Information and Requirements**

In Texas, a disabled adult has a right to a special homestead exemption. If you qualify, this exemption can reduce your taxes substantially. By law, school districts must provide a \$10,000 disability exemption. Other taxing entities have the option to offer disability exemptions of at least \$3,000. If you qualify, you will receive this exemption in addition to the general homestead exemption. However, you cannot receive both a disability exemption and an over-65 exemption for the same taxing unit.

### **Who is a disabled person for the purposes of this exemption?**

The Texas Property Tax Code provides that you are entitled to the exemption if you meet the Social Security Administration's tests for disability. In simplest terms:

- 1) You must have a medically determinable physical or mental impairment;
- 2) The impairment must prevent you from engaging in any substantial gainful activity; and
- 3) The impairment must be expected to last for at least 12 continuous months or to result in death.

Alternatively, you will qualify if you are 55 or older and blind and cannot engage in your previous work because of your blindness.

### **Do I have to be receiving disability benefits to qualify?**

You do not have to be receiving disability benefits, but you must meet the definition of disabled given above. If you receive disability benefits under the Federal Old Age, Survivors, and Disability Insurance Program through the Social Security Administration you will automatically qualify. Disability benefits from any other program do not automatically qualify you for this exemption.

### **How do I claim the exemption?**

To claim the exemption, you must file an application with the appraisal district. The application must include documentation of your disability. The application form is entitled "Application for Residential Homestead Exemption." This form can be obtained from our website ([www.TAD.org](http://www.TAD.org)) or by request to the Tarrant Appraisal District - Exemptions Division at (817) 284-4063. In it, you should complete all applicable information. Be especially certain to mark the box that recognizes your claim for the disability exemption. The most common reason for denial of this exemption is failure to provide adequate documentation.

### **What kind of documents should I include?**

The best form of documentation, if you are receiving Social Security Disability, is a copy of your disability determination letter issued by the Social Security Administration dated within the last 12 months. If you are not receiving Social Security Disability, then have your physician complete a TAD's Physician's Statement for Disability Homestead Exemption or attach information from a recognized retirement system verifying your permanent disability.

### **Where do I file my application?**

Once you have completed the application and secured appropriate documentation, you may mail or file your request directly with the appraisal district at the address given on this form. Action on your application usually will occur within four to six weeks from the date it is received. In the event the appraisal district disagrees with your request, you will be notified and offered an opportunity to protest this decision. For any questions or additional assistance, you are encouraged to call a TAD representative at (817) 284-4063 between the hours of 8:00 a.m. and 5:00 p.m., Monday through Friday.

### **Duty to Notify**

If the chief appraiser grants the homestead exemption(s), you do not need to reapply annually. However, you must reapply if the chief appraiser requires you to do so, or if you want the exemption to apply to property not listed in this application.

**You MUST NOTIFY the chief appraiser IN WRITING BEFORE MAY 1 of the year after your right to this exemption ends.**