

Name: _____

County: _____

DISABLED VETERANS' EXEMPTION SELF-STUDY TRAINING SESSION
REVIEW QUESTIONS

1. When a veteran and spouse are separated, the residence remains eligible for the exemption in the case where the veteran has moved out of the home but title remains in the name of both spouses.
☐ True
☐ False

2. A qualified claimant for the Disabled Veterans' Exemption includes which of the following [mark all that apply]?
☐ A veteran that is rated temporarily 100% disabled due to convalescence after surgery, even though a reduced rating of less than 100% may follow after rehabilitation.
☐ A surviving spouse of a qualified veteran who has remarried.
☐ A veteran that is rated 80% disabled, but being paid at the 100% rate due to individual unemployability.
☐ A surviving spouse of a qualified veteran who remarried but became single again after divorce.

3. If a disabled veteran claimant and his fiancé each have 50% interest in their residence, the available exemption is 50% of the assessed value of the home or 50% of the maximum exemption, whichever is lower.
☐ True
☐ False

4. A Disabled Veterans' Exemption claimant, his spouse, and their son have equal undivided interests in their home. Based on the 2015 basic exemption of \$126,380, what is the eligible exemption if the property's assessed value is as follows?

Assessed Value of Home	Exemption Amount Allowable
\$210,000	
\$150,000	

5. The Assessor must always obtain a copy of the U.S. Department of Veterans' Affairs initial rating letter that describes all the conditions of disability which determined the 100% rating.
- ☐ True
- ☐ False
6. What sources of income must be reported when determining a claimant's household income for the low-income Disabled Veterans' Exemption?
- ☐ Rental property income
- ☐ Social security benefits
- ☐ Veterans' disability compensation
- ☐ Wages of an adult son who lives in the home
- ☐ All of the above
7. A qualifying disabled veteran purchases a property on September 15, 2015 and moves in two weeks later. The exemption will be granted as of which of the following?
- ☐ July 1, 2016 – property must qualify as of the lien date each year to receive the exemption for the ensuing year.
- ☐ January 1, 2016 – following lien date.
- ☐ July 1, 2015 – the beginning of the fiscal year in which the property qualifies.
- ☐ September 15, 2015 – the date of acquisition.
8. To determine the amount of exemption applicable to a first-time claimant, the Assessor calculates the ratio of the actual number of days the property is qualified in the fiscal year to the total number of days in the fiscal year, and that ratio is applied to either the maximum scheduled exemption amount or the assessed value of the property, whichever is lower.
- ☐ True
- ☐ False
9. A claimant who is eligible for the basic exemption files a timely claim. What is the exemption for the 2015-16 fiscal year based on an assessed value \$110,000 with an October 1, 2015 effective date of 100% disability? The basic exemption amount for 2015 is \$126,380 and 2016 is a leap year. [See attachment for calendar.]
- ☐ \$82,350
- ☐ \$94,612
- ☐ \$110,000
- ☐ \$126,380

10. The Disabled Veterans' Exemption may continue on a property when a qualifying claimant needs to move in with a parent who will provide care, and the claimant rents his home and does not purchase another home.

☐ True

☐ False

11. A claimant for the low-income Disabled Veterans' Exemption must file an annual claim on or before March 1 to attest that their household income for the prior year does not exceed the current income limitations.

☐ True

☐ False

12. Based on the following information, what is the last date for which a timely claim may be filed for the Disabled Veterans' Exemption? [See attachment for calendar.]

Effective Date of Disability	Date of USDVA Rating Letter	Date Property Purchased
February 20, 2015	November 1, 2015	December 1, 2015

13. Based on the following information, what is the percentage of the Disabled Veterans' Exemption that is available for each year?

Effective Date of Disability	Date USDVA Rating Letter Received	Date Property Purchased	Date Initial Claim Filed
January 22, 2014	November 1, 2014	August 1, 2001	September 1, 2015

Fiscal Year	Percentage Exemption Available
2013-2014	
2014-2015	
2015-2016	

14. If a low-income claimant does not submit an annual claim by the time the roll must be closed, what should the Assessor do?
- ☐ Remove the exemption.
 - ☐ Grant a reduced exemption of 85%.
 - ☐ Grant a reduced exemption of 90%, then contact the claimant to ensure the claimant still resides at the property and remind him or her to file the annual claim.
 - ☐ Change the exemption to the basic exemption. If the claimant files later, a roll correction may be needed to accommodate a late filing for the low-income exemption.
15. Based on the following information, what exemption amount is available for a low-income claimant when the 2015 *annual filing* is filed on December 21, 2015?

Assessed Value	2015 Low-Income Exemption Limit	2015 Basic Exemption Limit	Date Claim Filed
\$155,500	\$189,571	\$126,380	December 21, 2015

- ☐ \$132,175
- ☐ \$139,950
- ☐ \$151,132
- ☐ \$161,135

2015

January

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

February

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

March

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

April

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

May

S	M	T	W	T	F	S
31					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

June

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

July

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

August

S	M	T	W	T	F	S
30	31					1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

September

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

October

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

November

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

December

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

2016

JANUARY

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

FEBRUARY

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29				

MARCH

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

APRIL

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

MAY

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

JUNE

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

JULY

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

AUGUST

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

SEPTEMBER

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

OCTOBER

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

NOVEMBER

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

DECEMBER

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						