

# Senior Citizen Assessment Freeze Application Guide using the on-line Smartfile E-Filing Portal

**Rebecca M. Tonigan**

Cuba Township Assessor

28000 W. Cuba Road

Barrington, Illinois 60010

Phone: 847-381-1120

Email: [Info@Cubaassessoril.org](mailto:Info@Cubaassessoril.org)

Website :[cubatwpil.gov](http://cubatwpil.gov)

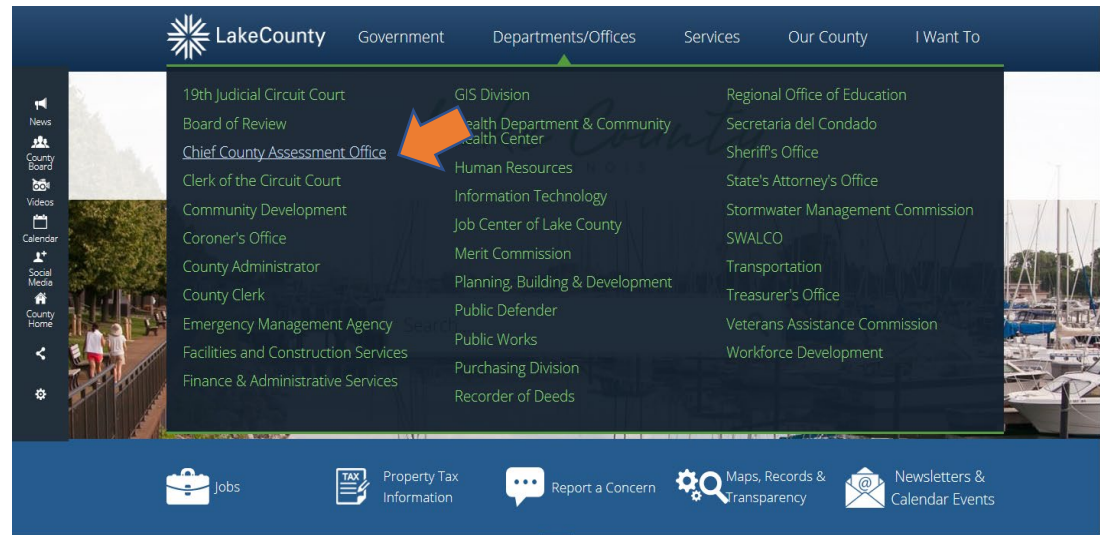
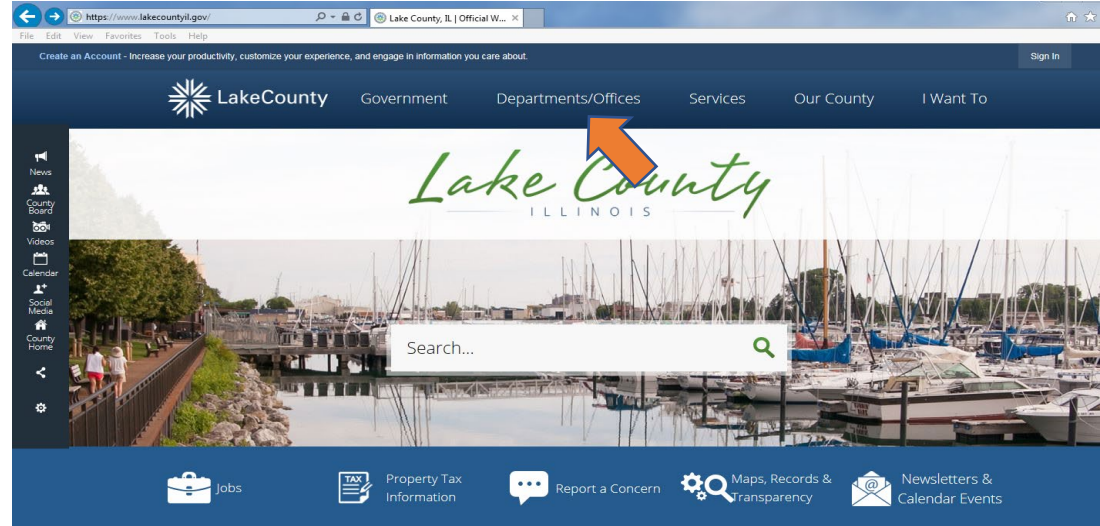
## To Begin:

- Go to [www.lakecountyil.gov](http://www.lakecountyil.gov)
- Hover over Departments/Offices
- Click on Chief County Assessment Office.

## Required Documents:

- Drivers License or State ID
- 2020 Federal Income Tax

\*\*\* For on-line filing you will need to have the ability to scan your drivers license, 2020 Federal Income Tax, and a copy of your trust (if applicable) so you can upload them to the file.



Click on the [Smartfile, E-Filing Portal](#).

The Lake County Login page will open (below)

If you already have an account, enter your email and password then click [LOGIN](#)



## Login

Email

Password

Login

[Guest Login](#)

[Forgot password?](#)

[New user? Create an account](#)

To create an account, click on [New user? Create and account.](#)



### \*\*\* New Account Set-Up \*\*\*



## Account Registration

To register for a new account, complete the information below and click the Register button.

Email

Password

8-character minimum; case-sensitive

Register

When creating a New User account, you will need:

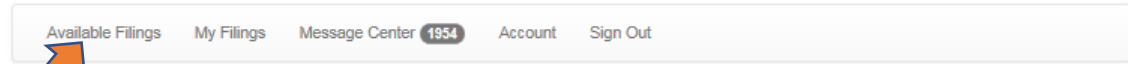
- an active e-mail address
- to create a password for your Lake County account.
- Verify your new account via your e-mail

Click on [Available Filings](#).

A list of all possible filings will display.  
Scroll down as there are several choices  
click on:

[EX – Senior Citizens Assessment Freeze  
Homestead Exemption](#)

Click on [Begin Filing](#).



## Available Filings

To create a new filing, click on a filing type below.

### [EX - Senior Citizens Assessment Freeze Homestead Exemption](#)

The Senior Freeze provides seniors with limited income protection against real estate tax increases due to rising property values. It is not a tax freeze or a tax reduction and does not protect against increased taxes due to tax rate increases. To qualify, applicants must be 65 years of age or older, own the property as their principal residence for the past two January 1, and have a total household income of \$65,000 or less.

## Senior Citizens Assessment Freeze Homestead Exemption

This filing is for the Senior Freeze.

To qualify, applicants must be 65 years of age or older and live in the property as their principal residence for the last two January 1st. The total household income for the prior year must be \$65,000 or less.

If filing for a year other than the current calendar year, applications can only be submitted until October 15th.



Make sure you select the 2021 Tax Year for which you are filing for the exemption.

If you know your Parcel PIN enter it without hyphens or spaces and click SEARCH.

Then click Start Filing

You can find your Parcel PIN on the Tax Bill or Blue Assessment Notice.


If you do not have your Parcel PIN, you can search by Owner Name or Property Address. Follow the instructions on the web page.

Still having trouble finding the PIN, contact us at the Cuba Township Assessor's Office - 847-381-1120, Mon - Fri 9 AM to 4:00 PM.

## Search for Property

Please search for your property using **ONE** of the search options below. If you know your **PIN**, you do not need to fill in any of the other search boxes. If trying to search by name, the search works most effectively by using last name. Once you find your property, select it in the search results grid, then click the Start Filing button.

Tax Year:\*    
Required

 Click the drop-down arrow to select the 2021 Tax Year.

If you know your Property's Identification Number (PIN), enter it here:

Parcel PIN:   
Without hyphens or spaces

If you do not know your Property's Identification Number (PIN), you can search by Owner Name or Property Address:

Owner Name:

*LastName, FirstName*

A wildcard is assumed at the end; to include a wildcard in another position type '%'. For example:

Frank will return: Frank, Franklin, Franken, Frankel, etc.

B%o%ski will return: Bojarski, Bronowski, Bukowski, etc.

Building/House Number:

Street Name:



**Click Search.** If you entered a correct PIN, or searched a correct Name or Address it will show under **Search Results**. Click **Start Filing** if your PIN and Address populate.

## Search Results

	Parcel PIN	Location Address
 <input type="button" value="Start Filing"/>	<input type="text" value="PIN with show here."/>	<input type="text" value="Address will show here."/>

1 - 1 of 1 items

Your PIN number and Address will populate, if everything looks good click on NEXT.

Verify Parcel Applicant Application Attachments Submit

### Verify Property Information

Please verify you have selected the correct property.

**If you see this statement, disregard it. It will have no impact on your Assessment Freeze Application.**

**Our records indicate that you do not currently have a Senior Household Exemption. You will be automatically entered for this benefit.**

**PIN**

Your PIN number will show here. ✓

**Location Address**

Your address will show here.

Cancel Filing Next

If this error message appears at anytime while filing out the form, Click on I'll fix this now. Any required information that is missing will be highlighted.



Attention Required

This form (**Application**) contains invalid data.

You can continue entering information, but in order to submit this filing you will need to address this invalid data.

I'll fix this now I'll fix this later - Continue to Attachments

## Household Information

Per the Assessment Freeze instructions, an applicant is required to add all household members and include all income for all persons residing at your residence. This would include a spouse or any other persons residing with you.

For the senior applicant

- Click on the Household member name
- Enter the Date of Birth, Phone, Email
- Mark the check box indicating “income will be included”

To add Household Members

- Click ADD
- Enter the Household Member Name, Address, Date of Birth, Phone, Email
- Mark the check box indicating “income will be included”

When all entries are complete click NEXT.

Verify Parcel **Applicant** Application Attachments Submit

### Household Information

Please provide details for all household members currently residing in/on this property.  
All household members must be included. Your spouse must also be listed (whether they live with you or not).

Add Delete

#	Household Member
1	Your name and or other persons name listed on Deed to the House. Click on name who is filing for the Exemption.

1 - 1 of 1 items

### Applicant Information


Household Member's Name: Full Name \*

Address: Street Address  
Apt., Unit No.  
City, State Zip

Date of Birth: MM/DD/YYYY \* Phone: (###) ###-#### \*

Email: Email Address

Email: Email Address

This person's income will be included in application:  

Explain: Why is income not included

Click 'Add' from the top of the page to add additional Household Members. When all members have been added, click 'Next' to continue.

Previous Cancel Filing **Next**

Click the drop-down arrow and select

- Yes or No if your property is in a **\*\*trust**.
- Verify the property address is correct.
- Using the drop-down arrows answer the questions.

Continue to next page of this help document.

**\*\*If your property is held in a trust, we must verify you are a beneficiary of the trust. The exemptions cannot be applied without this verification.**

A copy of the pages of the actual trust agreement that state the applicant is a beneficiary are required at the time of filing.

Verify Parcel Applicant **Application** Attachments Submit

Need Help?

### Application Information

Please provide details for the application.

#### Property Information

Is this property Owned in Trust?

Property Address:

Have you or your spouse received this exemption previously?

If your spouse maintains a separate residence, has he/she applied for this exemption?

Does this property have multiple dwelling units?

Using your Federal Form 1040 or 1040 SR, enter income to the correct lines on this form.

When finished click **CALCULATE**

### Household Income Information for 2020

Enter total household income then click 'Calculate' to calculate. If you would like to attach a copy of your income tax for 2020, you may on the Attachments tab

<b>1. Social Security and SSI Benefits. Include Medicare deductions:</b>	1.	<input type="text" value="Enter Amount"/>
<b>2. Railroad Retirement Benefits. Include Medicare Deductions:</b>	2.	<input type="text" value="Enter Amount"/>
<b>3. Civil Service Benefits:</b>	3.	<input type="text" value="Enter Amount"/>
<b>4a. Annuity Benefits(See instructions for Line 4):</b>	4a.	<input type="text" value="Enter Amount"/>
<b>4b. Federally Taxable pensions and retirement plan distributions:</b>	4b.	<input type="text" value="Enter Amount"/>
<b>5. Human Services and other governmental case public assistance:</b>	5.	<input type="text" value="Enter Amount"/>
<b>6. Wages, Salaries, and tips from work:</b>	6.	<input type="text" value="Enter Amount"/>
<b>7. Interest and dividends received:</b>	7.	<input type="text" value="Enter Amount"/>
<b>8. Net Rental, farm, and busiess income (loss). (See instructions for line 8):</b>	8.	<input type="text" value="Enter Amount"/>
<b>9. Net Capital gain or (loss). (See instructions for Line 9):</b>	9.	<input type="text" value="Enter Amount"/>
<b>10. Other income or (loss). (See instructions for Line 10):</b>	10.	<input type="text" value="Enter Amount"/>
<b>11. Add Lines 1 through 10:</b>	11.	<input type="text"/>
<b>12. Certain Subtractions. You may subtract only the reported adjustment to income from US 1040, Schedule 1 Line 36:</b>		
<b>12a. Subtraction Item A:</b>	<input type="text"/>	<b>Amount:</b> <input type="text" value="Enter Amount"/>
<b>12b. Subtraction Item B:</b>	<input type="text"/>	<b>Amount:</b> <input type="text" value="Enter Amount"/>
<b>13. Subtract Lines 12a and 12b from Line 11. This is your total household income for this year:</b>	13.	<input type="text"/>



Choose the statement that best applies to your situation by either clicking on a box or using the drop-down arrow.

Answer questions 1, 2 and 4 to best reflect your situation.

For questions 3, 5 and 6 Use the drop-down arrow to select the answer that best applies to your situation.

Click NEXT.

Affidavit

1. Mark the Statement that Applies

1a. On Jan 1, 2020 & Jan 1, 2021, the property identified in this application was used as my principal residence.

1b. On Jan 1, 2020 & Jan 1, 2021, the property identified in this application was my principal residence in which I received this exemption previously and is either unoccupied or used as spouse's principal Residence. I am now a resident of a facility licensed under the Assisted Living & Shared Housing Act, or Specialized Mental Health Rehabilitation Act of 2013.

2. Mark the Statement that Applies

2a. On Jan 1, 2020 & Jan 1, 2021, I was the owner of record on the identified property.

2b. On Jan 1, 2020 & Jan 1, 2021, I had legal or equitable interest in a written instrument in the identified property.

2c. On Jan 1, 2020 & Jan 1, 2021, I had a leasehold interest in the identified property that was used as a single-family residence.

3. I am liable for paying real property taxes on the property identified.

4. Mark the Statement that Applies.

4a. In 2021, I am 65 years of age or older.

4b. My spouse passed away in 2021, and would have been 65 years of age or older.

5. The property identified is the only property for which I have applied for a Senior Citizens Assessment Freeze.

6. The amount reported in this form includes my income, my spouse's income, and income of all persons living in my household, and the total income for previous year is \$65,000 or less.

Marital Status as of Jan 1, 2021

This is where you will need to scan or take a picture of your Drivers License or State ID and upload the file to the application.

When you click SELECT FILES, your computer will open showing all different drives where a file could be saved.

This will be different on all computers. You will need to know where your Drivers License or State ID has been saved, as well as your Trust documents, if applicable.

It is a best practice to attach a copy of your Federal form 1040 or 1040 SR.

You can follow the same procedure as used for the Drivers License.

Click NEXT.

Verify Parcel Applicant Application **Attachments** Submit

### GovtID

\* - You must attach at least one document in this category.

**Current Attachments:**

Attach more files for this category:

Select files... *drop files here to upload*

### Income Tax

**Current Attachments:**

Attach more files for this category:

Select files... *drop files here to upload*

### Trust

If you recently placed your property into trust, please provide trust information.

**Current Attachments:**

Attach more files for this category:

Select files... *drop files here to upload*

Previous Cancel Filing **Next**

Click SUBMIT. A box will pop up asking if you really want to submit this application.

Click SUBMIT again.

A new box will pop up with a File ID number. It is your choice to copy this number as it will not show up on form if you print a copy.

Click OK on the File ID box and decide if you want to print a copy of the completed application or click DONE.

Check your email for confirmation of filing.

Verify Parcel Applicant Application Attachments **Submit**

**Legal Notice**

By clicking submit below, under penalties of perjury, I state that to the best of my knowledge, the information contained in this application including any attachment, is true correct and complete.

All submitted applications are subject to review in accordance with State law and the procedures of the Chief County Assessment Office of Lake County.

We recommend that you keep a copy of this application for your records.

***\*\*Note: Your filing is not submitted until you click 'Submit' below and receive a confirmation. If you click 'Print Draft', please be sure to close the print window and return to your filing to submit.***

**If you receive a message that your filing cannot be submitted, please confirm that you have completed all required information; marked with a red asterisk(\*):**

- Uploaded all required attachments on the attachment tab
- Completed all tabs for required information

Previous Cancel Filing Print Draft **Submit**