

Home Office Template

This template is designed for individuals who can claim a home office. You can only claim a home office if you are self-employed, your employer does not provide an office, or if it's for the convenience of the employer. You must have a space that is exclusively used for work.

1. This home office deduction is for: _____ Taxpayer _____ Spouse
2. My home office is for: _____ W2 Job _____ Solely owned Business _____ Partnership/S-Corp
3. Office Size:
 - Office size and home size same as prior year (Go to #4).
 - Size of office/home changed or claiming office for the first time (Complete Sq. Ft below).
Sq. Ft. of Office: _____ Sq. Ft. of Home: _____
4. Is this the first year you are claiming a home office? _____ Yes _____ No (If yes, complete information below. If no, go to #5).
Purchase Price of Home: \$ _____ Cost of Improvements: \$ _____
Fair Market Value of Home: \$ _____
5. There are two methods for the home office deduction. Actual expenses require more record keeping because you are providing actual amounts paid, but typically has the higher deduction. Safe Harbor only requires the square feet of the home office and home. **If you elect Safe Harbor, I understand that I will not get a deduction on the PA or Local tax return.**
 - I want to claim actual expenses for my home office (complete #6).
 - I want to claim the Safe Harbor Method for my home office (no more information is required).
6. Home Office Expenses: **(Note – If you are a W-2 employee and do not provide these expenses, you will receive no tax benefit)**
Cost of Homeowners Insurance: \$ _____ Cost of Repairs to the home: \$ _____
Cost of Maintenance to the home: \$ _____ Cost of Utilities for the home: \$ _____
Cost of Homeowners Association Dues: \$ _____

Note: This template must be completed for each home office being claimed on the tax return.