

Instructions for Completing Refund Petition

This form is to be used for **all** refunds requests except Individual Employee Wage tax. If you need to file an individual employee wage petition, refer to the contact information on the front of this form. **Employers** must use this petition for withheld wage tax refund requests.

1. **Individuals** - Enter the name of the petitioner.
2. **Business Name** - For non-individual petitioners, enter the name of the entity.
3. **Mailing Address** - Enter the address where the refund is to be mailed.
- 4 and 5. **Social Security and Federal Employer Identification Numbers** - Individuals must enter a Social Security number. All other entities must enter a Federal Employer Identification number.
6. **Property Address** - This is required for all Real Estate, Water/Sewer and Business Use & Occupancy petitions. Enter the address of the property for which the refund is being requested.
7. **Contact Information** - Provide a phone number, fax number and/or e-mail address where you can be reached.
8. **Refund Type** - Check the appropriate block(s). If this petition is not for a refund of taxes, enter the type of refund requested under "other". A single Refund Petition may be used for multiple tax types and years.
 - A. **Tax Account Number** - Enter the tax specific account number(s).
 - B. **Tax Years and/or Tax Periods** - If tax is an annual tax, enter year. If tax is periodic, e.g., quarterly or monthly, enter period(s) and year(s).
 - C. **Amount of Claim** - Enter the amount of the refund requested.

Wage Tax - Additional information is required before a decision can be made on your refund request. Provide a letter on company letterhead (signed by an officer of the company) stating that the additional tax withheld has been returned to the employees. If your refund request is resulting from a duplicate payment, provide supporting documentation. If you have questions about your filing requirements, application of payments or tax balances, call Taxpayer Services at 215-686-6600.

Real Estate - Refund requests must be accompanied by a copy of the front and back of the canceled check(s) unless the refund is due to a property reassessment. If the refund is due to a sale of the property or refinancing, you must also supply a copy of the settlement sheet. Mortgage companies must supply a copy of the disbursement/check listing.

Other - Intra-Departmental Refunds - All petitions must include the signature and title of the Department's authorized designee in addition to the petitioner's signature.

9. **Reason for refund** - Enter reason for refund. If you have additional documentation, attach to this petition.

This Petition must be signed and dated. If you have any questions regarding the preparation of this petition, see the contact information on the front of this form.