

Income-based Wage Tax Refund Petition

Tax Year 2020 - Residents only

If you are approved for Pennsylvania [tax forgiveness](#) (PA 40 Schedule SP), you may also be entitled to receive a refund of City Wage Tax withheld by your employer. **Use this form only if you are a resident of Philadelphia.** See instructions on Page 2.

1 Applicant Information

Employee Name _____

Social Security Number _____

Property address _____

Phone number _____

Email address _____

Filing status

SINGLE/SEPARATED/DECEASED

MARRIED, filing separately

Number of W-2s attached _____

Number of dependents _____

Total eligibility income
(PA 40 Schedule SP, line 11) _____

2 Calculate your refund

Please enter your 2020 W-2 information in the worksheet below. Do not include spouse W-2 information. If you have more than four W-2s, please see instructions. **This form is for Philadelphia residents only.**

	Employer 1	Employer 2	Employer 3	Employer 4	Total
1. Employer Identification Number (W-2 Box b)					
2. Philadelphia wages earned Jan 1, 2020 - Jun 30, 2020					
3. Resident income-based Wage Tax due (Multiply Line 2 x 0.033712)					
4. Philadelphia wages earned Jul 1, 2020 - Dec 31, 2020					
5. Resident income-based Wage Tax due (Multiply Line 4 x 0.015)					
6. Total income-based Wage Tax due (Add Line 3 + Line 5)					
7. Wage Tax withheld (W-2 Box 19)					
8. Refund due (Subtract Line 7 - Line 6)					

3 Signature

I have reviewed all the information on this form and I certify that this information is true and correct to the best of my knowledge, information and belief. I agree that if I knowingly file an application which is false in any material matter, I shall be subject to all applicable penalties as prescribed by City Ordinance.

Taxpayer Signature _____

Date _____

Preparer Signature _____

Date _____



Don't forget: copies of your PA 40 Schedule SP and all W-2s!



Mail completed form and all documents to:

Philadelphia Department of Revenue
PO Box 53360
Philadelphia, PA 19105

Or return by fax: (215) 686-6228

See instructions on
Page 2



Instructions

If you are approved for Pennsylvania [tax forgiveness](#) (PA 40 Schedule SP), you may also be entitled to receive a refund of City Wage Tax withheld by your employer.

You are **not eligible** for a refund if you owe delinquent taxes or fees to the City of Philadelphia. You **must use a different petition** to request a Wage Tax refund:

- if you are not a resident of Philadelphia,
- for work performed outside Philadelphia, or
- for non-reimbursed business expenses.

Find all our forms at www.phila.gov/revenue.

The checklist below includes a list of documents **you must submit** with your application.

Document Check List

With your form, you must submit your:

- Completed Pennsylvania 40 Schedule SP** for tax year 2020.
 - The City of Philadelphia will check to make sure these documents match your state records.
- W-2 forms** for which you are requesting a refund, showing Federal, State, Medicare and Local wages and withholdings.
 - If you have more than four employers, please complete additional petition forms and attach it to this application.
 - Remember, do **not** include your spouse's W-2 information. Your spouse must file their own income-based Wage Tax refund petition to receive a refund.

Total eligibility income

Your **total eligibility income** must be below the limits set by the Pennsylvania [tax forgiveness](#) program (40 Schedule SP). The full 2020 eligibility income table is located on the Pennsylvania Department of Revenue's website: www.revenue.pa.gov.

No. of dependent children	0	1	2	3	4	5	6
Unmarried/separated/deceased	\$8,750	\$18,250	\$27,750	\$37,250	\$46,750	\$56,250	\$65,750
Married	\$15,250	\$24,750	\$34,250	\$43,750	\$53,250	\$62,750	\$72,250