

# Income-based Wage Tax Refund Petition

## Tax Year 2021 - 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, filin 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 2021 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, 2021 - Jun 30, 2021					
3. Resident income-based Wage Tax due (Multiply Line 2 x 0.015)					
4. Philadelphia wages earned Jul 1, 2021 - Dec 31, 2021					
5. Resident income-based Wage Tax due (Multiply Line 4 x 0.015)					
<b>6. Total income-based Wage Tax due (Add Line 3 + Line 5)</b>					
7. Wage Tax withheld (W-2 Box 19)					
<b>8. Refund due (Subtract Line 7 - Line 6)</b>					


### 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 

## Electronic Filing is now available on the Philadelphia Tax Center

You can now file this Wage Tax petition at [tax-service.phila.gov](https://tax-service.phila.gov). You do not need a username and password to file a Wage Tax petition on the Tax Center, simply select “Request a Wage Tax refund” from the front page. Although paper forms are available, we encourage you to file through the Tax Center to avoid delays.

## 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](http://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 2021.
  - 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 2021 eligibility income table is located on the Pennsylvania Department of Revenue’s website: [www.revenue.pa.gov](http://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