

Income-based Wage Tax Refund Petition

Tax Year 2023 - 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 2023 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, 2023 - Dec 31, 2023					
3. Resident income-based Wage Tax due (Multiply Line 2 x 0.015)					
4. Wage Tax withheld (W-2 Box 19)					
5. Refund due (Subtract Line 4 - Line 3)					

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. 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 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 2023.
 - 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 2023 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