

## Income-based Wage Tax Refund Petition

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

**Residents and nonresidents can use this form.**  
See instructions on Page 2.

Find more information about PA Tax Forgiveness at [bit.ly/PA-SP40](https://bit.ly/PA-SP40).

### 1 Applicant Information

Employee Name

Social Security Number or ITIN

Mailing address

Phone number

Email address

**Refund is for wages earned in what year?**

Filing status

☐ SINGLE/SEPARATED/DECEASED

☐ MARRIED, filing separately

Number of W-2s attached

Number of dependents

Total eligible income

(PA 40 Schedule SP, line 11)

### 2 Calculate your refund

Please enter your W-2 information into 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 in the year January 1 - December 31					
3. Resident income-based Wage Tax due (Multiply Line 2 x 0.015)					
4. Wage Tax withheld (W-2 Box 19)					
<b>5. Refund due (Subtract Line 4 - Line 3)</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 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 **phila.gov/revenue**.

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



### Document Check List

With this form, you must submit your:

☐ **Completed Pennsylvania 40 Schedule SP.**

- 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 eligibility income table is located on the Pennsylvania Department of Revenue's website: **bit.ly/PA-SP40**.