

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.

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)					
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

See instructions on Page 2





Electronic Filing is 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.

NEW File online to receive your refund through direct deposit. You will be asked for banking information. If you file on paper, you will receive a paper check.

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 general 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**.