

Senior Business Administrator Meeting

February 17, 2021

Philadelphia City Wage Tax Refunds

For 2020, there are two different forms you can use to claim a refund, depending on your situation:

- 2020 COVID EZ Wage Tax refund petition (New for 2020!)
- 2020 Wage Tax refund petition (Same process as in prior years)

TAX YEAR 2020	NON-RESIDENT COVID – EZ REFUND PETITION SALARY/HOURLY <small>(Not to be used by Commissioned Employees)</small>	<small>OFFICE USE ONLY</small>
<p>Skip the paper! Find a digital version of this form online at www.phila.gov/revenue. If your employer has submitted a petition on your behalf, DO NOT submit a petition yourself. Read the instructions for both the Employer as well as the Employee on the reverse side of this form prior to completing this petition. Print or type all information. The completed petition must include:</p> <ul style="list-style-type: none"> - an attached W-2 showing Federal, State, Medicare and Local wages - an employer signature or attach a signed letter on Company letterhead verifying your work outside of Philadelphia due to COVID-19. 		

TAX YEAR 2020	WAGE TAX REFUND PETITION SALARY/HOURLY EMPLOYEES <small>(Not to be used by Commissioned Employees)</small>	<small>OFFICE USE ONLY</small>
<p>Read the instructions for both the Employer as well as the Employee on the reverse side of this form prior to completing this petition. Print or type all information. The completed petition must include:</p> <ul style="list-style-type: none"> W-2 showing Federal, State, Medicare and Local wages Signature of Employee and Employer PA Schedule UE if claiming expenses on Line 2E. If PA Schedule UE has an entry on Line 15, submit a breakdown of those expenses. 		

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2020 COVID EZ Wage Tax Refund Petition

You can use the paper or online form to request a refund of 2020 Wage Tax if you:

1. Live outside Philadelphia (non-resident), AND
2. Were required to work remotely by your employer due to the COVID-19 pandemic

This refund request must include:

1. Your W-2, AND
2. A letter from your employer, on company letterhead, stating the time period or dates you were required to work remotely.
 - A generic letter is available on the [Division of Finance website](#) and covers the period March 16, 2020 (the date remote work began) to May 31, 2020 (the date employee's work locations were updated to reflect their remote work location). Philadelphia City Wage Tax was no longer withheld and local taxes based on the updated work location were withheld effective June 1, 2020.

Philadelphia City Wage Tax Refunds

2020 Wage Tax refund Petition

As in previous years, employees who are required to work at various times outside of Philadelphia within a calendar year and who are *non-residents of Philadelphia*, may file for a wage tax refund claim directly with the City of Philadelphia. This form should be used for time worked outside of the City not related to COVID, such as for the time period from January 1, 2020 through March 13, 2020. The completed petition form must include the following:

1. 2020 W-2 showing Federal, Medicare, State, and Local wages
2. Statement of dates worked outside the City of Philadelphia signed by both the employee and the employer
3. Signatures from both the employee and the employer

Supervisors can visit the Division of Finance website for guidance:
[City of Philadelphia Wage Tax Refund - Guidance for Supervisors](#)

Philadelphia City Wage Tax Refunds

- Any refund claim must be filed within three years from the date the tax was paid or due, whichever date is later.
- The employee may be liable for taxes in other jurisdictions within Pennsylvania or in another state for any days worked outside of Philadelphia. It is the employee's responsibility to determine whether they have any such liability, to file the appropriate tax forms, and to make any payments due to such jurisdictions.

If you have any questions, please contact the Employee Solution Center at solutioncenter@upenn.edu.