



pennsylvania

DEPARTMENT OF REVENUE

Board of Appeals

PO BOX 281021

Harrisburg PA 17128-1021

BOARD OF APPEALS PETITION FORM

FOR INTERNAL USE ONLY

GENERAL INSTRUCTIONS: Please type or print neatly in blue or black ink. Attach a copy of the notice being appealed. Mail this petition to the address above. Petitions filed via the U.S. Postal Service are considered filed as of the postmark date. The department does not recognize meter dates. Petitions filed by any other method are considered filed on the date received by the department.

TAX INFORMATION:

☐ Sales Tax ☐ Employer Withholding Tax ☐ Corporation Tax ☐ Personal Income Tax ☐ Other _____

Account ID Number _____ Federal Employer Identification Number _____

Tax Period: Begin _____ End _____

Is this a petition for refund? ☐ Yes ☐ No If yes, ☐ Cash ☐ Credit Total Refund Requested \$ _____

If petition is in regard to sales tax, please list amount(s) below:

PA Tax Refund \$ _____ Philadelphia Tax Refund \$ _____ Allegheny County Tax Refund \$ _____

Has any portion of this request been included in another petition for refund or requested in a current or prior audit?

☐ Yes ☐ No If yes, please provide relevant docket number _____ and/or assessment number _____.

Is this a petition for reassessment of tax, penalty and/or interest? ☐ Yes ☐ No

Notice Number _____ Notice Mailing Date _____ Assessment Amount \$ _____

PETITIONER INFORMATION:

☐ Corporation ☐ Individual ☐ Partnership (Attach a list of partners and addresses.) ☐ Other _____

☐ Estate Date of Death _____ (Date of Death required for estates & personal income tax fiduciary appeals.)

Business Name _____

Trade Name _____

Individual Last Name _____ First Name _____ MI _____

Social Security Number _____ **PRIVACY NOTIFICATION:** The department is authorized under federal law, 42 U.S.C. § 405 (c), to use your Social Security number in administering state tax law. The department uses your Social Security number to establish your identity and to process your appeal.

Street Address _____ City _____ State _____

Country _____ ZIP Code +4 _____ Web site _____

Telephone _____ Fax _____ E-mail Address _____

Contact Person _____ Contact Phone Number _____

REPRESENTATIVE INFORMATION:

Representation by an attorney, CPA or other person is not required. However, if so represented, complete this area.

Business Name _____

Individual Last Name _____ First Name _____ MI _____

Street Address _____ City _____ State _____

Country _____ ZIP Code +4 _____ Web site _____

Telephone _____ Fax _____ E-mail Address _____

Contact Person _____ Contact Phone Number _____

SCHEDULING REQUEST:

☐ Hearing requested.

☐ No hearing requested. Please decide on basis of the petition and record.

☐ This case to be held pending action of court on the same issue(s).

Case Number _____ Court Citation Number _____

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DOCKET # _____

EXAMINER _____

PETITION DUE _____

Communication, including the board's final decision and order, may be transmitted to you or your representative via e-mail, should you elect so below. If you elect to receive communications via e-mail, you and your representatives assume the responsibility for the confidentiality of the information contained in e-mails sent to and from the Board of Appeals. The commonwealth will not be held liable for the disclosure of any confidential information sent via e-mail.

Send Decision and Order via (select only one): ☐ U.S. Mail or ☐ E-mail

Itemize the issue(s) involved. What is the subject of appeal?

Explain in detail why relief should be granted. Attach additional pages if necessary. Enclose copies of any supporting documents. Petitions for refund must be accompanied by proof of payment of the tax to the commonwealth and copies of invoices, credit memoranda, exemption certificates, etc. where relevant. Copies of canceled checks must include images of the fronts and backs of the checks. When submitting sales and use tax appeals (audit reassessments or refunds), complete and attach an Appeal Schedule (REV-39), following the instructions on the reverse side of the form. Appeal Schedules may be submitted electronically. A spreadsheet may also be created, using REV-39 as a guide. For information and instructions, call (717) 783-3664. The petition form and schedule are available on the Board's Online Petition Center at www.boardofappeals.state.pa.us.

[illegible]

All petitions must be signed by the petitioner or authorized representative. The department requires an original signature; therefore, no faxed, photocopied or ink-stamped signatures will be accepted. If signed only by an authorized representative, written authorization must accompany the petition. If the petitioner is a corporation, a corporate officer must sign.

Under penalties prescribed by law, I hereby certify this petition has been examined by me, and to the best of my knowledge, information and belief, the facts contained in the petition are true, correct and complete and the petition is not made for the purpose of delay. Also, if this is a petition for refund, I certify that the refund requested has not been granted in an audit report, nor has it been included in any other petition for refund.

Representative's Signature _____ Date _____