We provide here a written summary of answers provided by the Department Revenue to the committee at periodic question and answer sessions. These documents are classified as revenue information issued for informational purposes only for the convenience of PICPA's members. Pursuant to 61 Pa. Code Section 3.4, these documents should not be relied upon for any purpose or used in tax appeals. Taxpayers requiring a binding opinion on a specific fact situation may request a written letter ruling under 61 Pa. Code Section 3.3.
May 16, 2019
PICPA/DOR
Quarterly Meeting
Agenda

• Board of Appeals Online Petition Center

• PICPA Provided Questions

• Taxation Reorg Update

• PaTH Update
Board of Appeals Online Petition Center

- **Electronic Signatures**: You must have a registered electronic signature (User ID and Password) to use the Online Petition Center. If you currently use e-TIDES, you can use the same electronic signature for the Online Petition Center. To obtain an electronic signature account, select Register for a New Account. If you are experiencing difficulties with your eSignature/eTIDES account, please contact the Revenue eBusiness Unit at 717-783-6277 for business taxes, the E-Service Help Desk at 717-787-1392 for personal taxes, or retides@pa.gov.

- **Submitting a Petition**: To file a Petition, select Submit a Petition. You will be directed to fill out an online form with your appeal information. If you cannot create an E-Signature account and are near your appeal deadline the Board of Appeals can accept your completed petition form via FAX at (717) 346-2011. However, you will not receive a confirmation number for faxes and only the petition form should be sent; no additional evidence will be accepted.
  - How does the electronic filing process work?

- **Authorization to Represent**: If you are a representative, you must provide a Power of Attorney form or a signed statement on the Petitioner's letterhead authorizing you to act on their behalf. The completed Power of Attorney form or Statement of Authorization may be mailed, faxed (717-787-7270) or scanned and sent electronically to the Board with your petition. If sending a Statement of Authorization, please include the confirmation number provided at the end of the online submission process. If the Statement of Authorization or Power of Attorney form is not submitted electronically with the petition, the Board of Appeals must receive the form within 15 days of the date the petition was filed.

- **Corporate Officer Signature**: Corporate Tax appeals must provide a Corporate Officer Signature Form with the petition. The completed Corporate Officer Signature form may be mailed, faxed or scanned and sent electronically to the Board with your petition.

- **Evidence to be presented to the Board of Appeals**: Evidence submitted with your petition may be sent electronically as file attachments or in paper form. Refer to the FAQs for a list of acceptable electronic file formats. Please be sure to reference the Board of Appeals Docket Number on any correspondence.

- **Communications with the Board**: Communications, including the Board’s Final Order, may be transmitted to you or your representative via e-mail by making the election on the petition form. NOTE: Electronic communications via email are unsecured. If you elect to receive communications via e-mail, you and your representatives assume the responsibility for the confidentiality of the information contained in the e-mails sent to and from the Board. The Commonwealth will not be held liable for the disclosure of any confidential information sent via e-mail.

- **Download Tax Forms, Instructions and Publications**: You will need Adobe Acrobat Reader to view or print the forms, instructions and publications in PDF format. Adobe Acrobat Reader is available free of charge at Adobe's Web Site http://www.adobe.com/acrobat/readstep.html.

- To use the Online Petition Center you must have the proper browser with 128-bit encryption, cookies, and JavaScript enabled.
REVENUE APPEAL PROCESSING SYSTEM (RAPS) INTERNET APPEAL FILING TRADING PARTNER AGREEMENT

NOTE: In order to complete the RAPS On-Line Appeal process, you must agree to the following:

When accessing Revenue Appeal Processing System (RAPS) with the use of your User ID and password, your User ID and password will be deemed as your authorized signature for any transactions conducted during the time of that active session.

This is an Agreement between the PENNSYLVANIA DEPARTMENT OF REVENUE, hereinafter "the DEPARTMENT", and the PETITIONER/AUTHORIZED REPRESENTATIVE, hereinafter "the PETITIONER", entered into pursuant to the provisions of Pennsylvania statutory and regulatory law.

The DEPARTMENT and the PETITIONER agree as follows:

1. The DEPARTMENT authorizes the PETITIONER to file those Petitions for Appeal and subsequent documentation specifically indicated in this agreement by means of electronic transmission, for the duration of this Agreement. This Agreement does not alter the due dates for filing petition(s).

2. The signature of the PETITIONER or its authorized agent affixed to this Agreement shall be deemed to appear on such electronically filed Petitions for Appeal and subsequent documentation, as if so actually appearing.

3. Each Petitions for Appeal and subsequent documentation communicated in electronic form pursuant to this Agreement shall be considered to be "in writing" and "written" to an extent no less than as if in paper, to be "signed" and to be an original.

4. If the authorized agent signing such Agreement on behalf of the PETITIONER leaves the employment of the PETITIONER or becomes no longer authorized to sign such Petitions for Appeal and subsequent documentation for it, the PETITIONER is responsible for timely informing the Department and signing a new written agreement with the DEPARTMENT. Any failure to comply with this term shall result in the immediate termination of this agreement and the PETITIONER deemed to have filed an incomplete return.

5. The PETITIONER’s electronic transmission of such Petitions for Appeal and subsequent documentation must be made in a manner compatible with the DEPARTMENT’S software, equipment and facilities. Failure to comply with this provision will result in a finding that the Appeal and/or the subsequent documentation was never sent to or received by the DEPARTMENT.

6. This Agreement can be amended at any time by the execution of a written addendum to this Agreement by the DEPARTMENT and the PETITIONER.

7. The DEPARTMENT or the PETITIONER can cancel this Agreement at any time upon sixty (60) days notice to the other party.

8. This Agreement represents the entire understanding of the parties in relation to the electronic filing of Petitions for Appeal and subsequent documentation.

9. The place of performance of this Agreement is Harrisburg, Dauphin County, Pennsylvania. The provisions of Pennsylvania law shall govern this agreement.

I agree  I disagree

[Buttons: Cancel, Next]
**PETITION FORM**

Please enter the tax details and click Next to continue. Required fields are highlighted.

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tax Group</strong></td>
<td>Sales/Use/Hotel/Occupancy Tax</td>
</tr>
<tr>
<td><strong>Tax Type</strong></td>
<td>Sales/Use/Hotel/Occupancy Tax (PA-3)</td>
</tr>
<tr>
<td><strong>Appealing a Notice of Assessment?</strong></td>
<td>☐ No ☐ Yes</td>
</tr>
<tr>
<td><strong>Tax Identification Number</strong></td>
<td>(PA AccountID or SSN)</td>
</tr>
<tr>
<td><strong>Revenue ID</strong></td>
<td>0000000000 (Optional)</td>
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<tr>
<td><strong>Notice Mailing Date</strong></td>
<td>04/29/2019</td>
</tr>
<tr>
<td><strong>Assessment/Determination Number</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Tax Period</strong></td>
<td>01/01/2019 to 01/31/2019</td>
</tr>
<tr>
<td><strong>Assessment Tax Amount</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Assessment Penalty/ Fees Amount</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Was the Assessment Paid?</strong></td>
<td>☐ No ☐ Yes</td>
</tr>
<tr>
<td><strong>Paid Date</strong></td>
<td>03/01/2019</td>
</tr>
<tr>
<td><strong>Is this a Petition for Refund?</strong></td>
<td>☐ No ☐ Yes</td>
</tr>
<tr>
<td><strong>Please indicate the following:</strong></td>
<td>Cash ☐ Credit</td>
</tr>
<tr>
<td><strong>Amount</strong></td>
<td>$100</td>
</tr>
<tr>
<td><strong>Has any portion of this request been included in another Petition for Refund or requested in a current or prior audit?</strong></td>
<td>☐ No ☐ Yes</td>
</tr>
</tbody>
</table>
## PETITION FORM

Please enter the tax details and click Next to continue. Required fields are highlighted.

<table>
<thead>
<tr>
<th>Tax Group:</th>
<th>Sales/Use/Hotel Occupancy Tax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tax Type:</td>
<td>Sales/Use/Hotel Occupancy Tax (PA 3)</td>
</tr>
</tbody>
</table>

Appealing a Notice of Assessment?  
- [ ] No  
- [x] Yes

**Tax Identification Number:** 
(Enter PA Account ID or SSN)

**Revenue ID:**  
(Enter optional ID)

**Notice Mailing Date:** 04/29/2019

**Assessment/Determination Number:**

**Assessment Period:**  
01/01/2019 to 01/31/2019

**Assessment Tax Amount:**

**Assessment Penalty/Fees Amount:**

**Was the Assessment Paid?**  
- [ ] No  
- [x] Yes

**Paid Date:** 03/01/2019

**Is this a Petition for Refund?**  
- [ ] No  
- [x] Yes

**Please indicate the following:**  
- [ ] Cash  
- [ ] Credit

**Amount:** $100

Has any portion of this request been included in another Petition for Refund or requested in a current or prior audit?  
- [ ] No  
- [x] Yes
Petitioner Type: Business

Is Partnership?  ☐  • Attach list of Partners
  • Input list of Partners

Employer ID Number: 123456789 (Federal EIN or Entity ID)

Business Name: Rob Biddle LLC
Trade Name: 

Street Address1: 123 North Avenue

City/State/Zip: Harrisburg PA 17111

Country: UNITED STATES OF AMERICA

Telephone Number: (717) 123-4567 Extension: 
Fax Number: 
Web Site (URL): 

Petitioner Contact Person

Please enter additional contact information below (if not listed above).

First/Middle/Last Name: Robert Biddle

Telephone Number: (717) 123-4567 Extension: 

E-mail Address: biddle@gmail.com

Note: If you are a third party filing an appeal on behalf of the petitioner your information should be entered on the next screen as the Representative.
<table>
<thead>
<tr>
<th>Tax Type</th>
<th>Petitioner</th>
<th>Representative</th>
<th>Scheduling</th>
<th>Issues &amp; Arguments</th>
<th>Signature</th>
</tr>
</thead>
</table>

**Send All Correspondence To:**  
- Petitioner  
- Representative
PETITION FORM

Send All Correspondence To: [ ] Petitioner [ ] Representative

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

Remember you MUST submit a completed Power of Attorney form or a Statement of Authorization.

First/Middle/Last Name: Larry Slooge

Business Name: Dewey Cheatum & Howe

Street Address 1: 234 Gold Dr

Street Address 2:

City/State/Zip: Harrisburg PA

Country: UNITED STATES

Telephone Number: (717) 234-5678 Extension:

Fax Number:

Representative Contact Person

Please enter additional contact information below (if not listed above).

First/Middle/Last Name: Moe Slooge

Telephone Number: Extension:

Contact Email:
Your petition has been submitted to the Pennsylvania Department of Revenue Board of Appeals for processing.

You will be notified via email when:

- Your Petition is assigned a docket number, usually by the next business day.
- A Tax Examiner requires additional information to process your appeal.
- The Decision and Order is approved and your case is closed.

Your confirmation number is: 2019050615275291

This number confirms that your petition has been received by the Board of Appeals. No further action is required. Please retain this number for your records as this screen cannot be reproduced at a later date.
PICPA Provide Questions
Question #1

There is an increased level of use tax associated with purchases of vehicles through the Discovery Department. The basis for questioning blatant undervaluation of vehicles to avoid sales tax or consistently perceived under-reporting for specific taxpayers or vendors is understood, but we have seen numerous one-off use tax notifications that result in the possible additional use tax liability of under $300. The time and effort used to locate the supporting documents is a burden and once supporting documentation is supplied, notification is not received to ensure the matter has been resolved, that no further action is required, or that the Department does not agree with the documentation. No response is provided even after repeated requests for an update. Would it be possible to enact a more focused discovery process for vehicle transactions to ensure that a resolution is shared with the taxpayer or representative?
The ‘Motor Vehicle Understated Value’ (MVUV) program provides for the review of the vehicle valuations of used vehicles sold in Pennsylvania. The link on the Department’s webpage is: https://www.revenue.pa.gov/GeneralTaxInformation/Tax%20Types%20and%20Information/SUT/UseTax/MotorVehicleUnderstatedValueProgram/Pages/default.aspx.

From this initial set of referrals from PENNDOT, cases for DOR examination are selected and filtered based on case criteria such as make, model, age, and mileage of vehicle that are effective in filtering out ‘false positives.’
<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Count of 1st Letters</th>
<th>Amount Collected</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008/2009</td>
<td>35,532</td>
<td>$1,381,350.86</td>
</tr>
<tr>
<td>2009/2010</td>
<td>38,054</td>
<td>$1,775,275.75</td>
</tr>
<tr>
<td>2010/2011</td>
<td>53,141</td>
<td>$1,912,792.36</td>
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<tr>
<td>2011/2012</td>
<td>43,387</td>
<td>$1,950,083.68</td>
</tr>
<tr>
<td>2012/2013</td>
<td>32,730</td>
<td>$1,568,034.79</td>
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<td>2013/2014</td>
<td>28,021</td>
<td>$1,459,760.99</td>
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<td>2014/2015</td>
<td>6,238</td>
<td>$314,135.90</td>
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<tr>
<td>2015/2016</td>
<td>24,299</td>
<td>$1,433,323.28</td>
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<tr>
<td>2016/2017</td>
<td>17,631</td>
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<tr>
<td>2017/2018</td>
<td>25,275</td>
<td>$2,386,738.03</td>
</tr>
<tr>
<td></td>
<td>304,308</td>
<td>$16,699,118.91</td>
</tr>
</tbody>
</table>

Note the significant case volumes for this program over the last ten years.

[1]:
Question #2

Per the Wayfair SUT Bulletin published by the Department, the $100,000 threshold to determine Pennsylvania nexus is calculated in gross sales. If a company does not make taxable sales into Pennsylvania, but exceeds the $100,000 gross sales threshold, will the taxpayer still be required to register and file sales and use tax?
The Department will not require an entity to register and file sales and use tax returns if it has no taxable sales – one example would be an entity that sells 100% non-taxable goods (such as clothing).

Sellers who may have gross PA sales above the threshold that are otherwise subject to sales tax, but have customers that claim exemption due to the resale, manufacturing, or similar exemption are required to file if any of their sales are subject to sales tax. In this situation the sales themselves are on taxable items but may be exempt due to the purchaser’s status. These sellers need to file in PA, if any of the sales are ultimately subject to sales tax.
Company timely reported and paid fuels tax for April, May, June, and July 2016. However, an internal review determined that these periods were not properly reported and amended reports were filed in June of 2018. The result of filing the amended reports created a refund/credit balance for April 2016 and balances due for May, June and July 2016. The credit balance created for April 2016 was used to satisfy the entire tax due for May, June and July of 2016. Interest was calculated for May, June and July 2016 from the due date of the original return via the filing of the amended tax reports. Why is interest being assessed since the funds were always in the Department’s possession (the funds were just allocated to the wrong periods as originally reported)?
Answer #3

It is our bureau’s policy to apply credit to assessments as of the date the credit was established. The credit would not have been available until the amended report was received (in this instance: June 2018). Interest would have been calculated from the original due date of the report up to the received date of the amended report.
Question #4

Some examiners are disallowing unreimbursed expenses without requesting information from the taxpayer. Others are reaching out for an explanation before making any adjustment. Can the Department offer more consistency on the initial treatment?
The Bureau of Individual Taxes now utilizes one area to examine expenses and correspondence on expenses. Those examinations involve reviewing the current and prior year expenses and any responses received from prior years. If 2018’s expenses were denied outright without asking for any information, it is likely because the department asked for information in a prior year and received no response and/or the same or similar expenses were denied in a prior year. If you can provide specific information for any expense denials without a request for information, we would be happy to research the issue and provide the reason for the denial.
What is the reason behind filing separate individual returns for those clients with R & D Credits being passed through to them on K-1s? It would be easier to be able to file a joint return.
The R&D credit provisions in the Tax Reform Code are contained in Sections 1701-B to 1711-B. Section 1711-B contains the following provisions (emphasis added):

The secretary shall submit an annual report to the General Assembly indicating the effectiveness of the credit provided by this article no later than March 15 following the year in which the credits were approved. The report shall include the names of all taxpayers utilizing the credit as of the date of the report and the amount of credits approved and utilized by each taxpayer. Notwithstanding any law providing for the confidentiality of tax records, the information contained in the report shall be public information. The report may also include any recommendations for changes in the calculation or administration of the credit.

In addition, the Tax Reform Code in Section 301 (w) defines a taxpayer as (emphasis added):

"Taxpayer" means any individual, estate or trust subject to the tax imposed by this article, any partnership having a partner who is a taxpayer under this act, any Pennsylvania S corporation having a shareholder who is a taxpayer under this act and any person required to withhold tax under this article.

As noted, Section 1711-B requires the department to provide a list of taxpayers utilizing the credit. A taxpayer is further defined as an individual and not joint taxpayers. Because of these provisions and because the department’s computer system currently does not enable a credit allocated to a spouse via ownership in a business entity be identified separately from the primary taxpayer’s SSN, the credit must be reported on separate returns. Furthermore, there are no provisions in Sections 1701-B to 1711-B that permit the credit awarded to a taxpayer be utilized to offset the tax liability of the spouse, or vice versa. The provisions of the R&D credit are not like the EITC and OSTC credit provisions which permit the usage and reporting of the credit as utilized on the joint return of the taxpayer and spouse and allow the credit to offset either the taxpayer or spouse’s tax liability.
Question #6

Our clients are receiving small dollar penalty assessments for underpayment of estimated tax. However, they are completing the REV-1630 and checking the box on the PA-40 that it is attached. Why are they being assessed?
If your client had EUP billed to their account or had a refund adjustment and the EUP amount calculated by the department was not correct, please respond to the notice and the department will review the EUP for these smaller amounts and make an adjustment if appropriate.
Question #7

There are significant delays in processing EITC/OSTC refunds for individual taxpayers receiving these credits from partnerships. In some cases, it is taking 18 months from the filing of returns to receive refunds. All the necessary documentation is provided with the filings for the individuals and the partnerships. What can we do to expedite this process?
The department is experiencing delays in getting the credits added to our credits database along with delays in the allocation of the credits that were awarded. In addition, we have noticed that many pass-through entities are using an outdated version of the REV-1123, Educational Improvement/opportunity Scholarship Tax Credit Election Form. The older version of the REV-1123 required the form to be sent to the Bureau of Corporation Taxes whereas the newer versions of form (beginning with the 2017 tax year) require it to be sent to the Bureau of Individual Taxes. If the form was sent to the incorrect location, there were delays in having the information contained on the forms processed as the Bureau of Corporation Taxes Accounting Division has experienced significant reductions in staffing due to retirements.

The department has also noticed that some of the delays are the result of the Department of Community and Economic Development (DCED) not updating their systems in a timely manner. Those delays may be a result of recipients of the contributions not sending in the proper paperwork to DCED for verification of receipt of the contributions as required by their initial letter of acceptance to the business or special purpose entity making the contribution.

Please provide specific taxpayer identification information for the partnership and individuals so that we can research the exact reason for the delays. This delay has been noted by the department and we are working on updating the process so that these delays are eliminated or reduced.
Question #8

The Department appears to be experiencing a systemic problem specific to K-1 pass-thru taxes paid to other states, and the issue is exacerbated when the K-1 is from a composite tax return.

Because states have instituted a variety of rules as to how a nonresident member, partner, or shareholder of a pass-thru entity (PTE) must report their shares of state-sourced income, a composite return is filed by the PTE that reports the nonresident owner’s share of state income, and calculates tax that is paid by the PTE on behalf of the nonresident owner. Often, a composite return filed by the entity will eliminate the need for the nonresident to file an individual income tax return with those other nonresident states.

Regarding PA, the composite K-1 presents the information necessary to claim a credit for taxes paid to another state jurisdiction, via PA schedule G-L, against their resident PA individual income tax return. In a specific case, the Department denied the credit unless the taxpayer provided information beyond what is reasonable and required and requested information that is both voluminous and not necessarily obtainable by the taxpayer as a member, partner, or shareholder of the PTE. The examiner demanded correspondence from the entity, proof of tax payments, and copies of all the entities’ tax filings to all jurisdictions and conveyed the demand as if it is necessary and required policy. This is onerous beyond description. How can this problem be resolved at the administrative level?
The department requires certain documentation be provided with returns that claim resident credits. The information is not being provided. The information is required per Schedule G-L’s General Instructions, PA-20S/PA-65 Line 13b instructions and the regulation under Title 64, § 111.5. In many cases, the department is finding the entity is not providing the returns as required by the PA-20S/PA-65 instructions and the individuals are not providing the statements per the Schedule G-L instructions. The department developed these instructions so that individuals would not have the requirement of providing the returns. However, since many entities are not providing the returns, the department must request they be provided by the pass-through entity owners.
The Department has begun requiring copies of composite returns to support credits for taxes paid by resident partners. In the past, the Department has accepted withholding, or affidavits from the partnership. Why has the approach changed? Can the Department accept something other than the full composite return? In many cases, the partner is not entitled to see the full composite return, since it contains income information and Personally Identifiable Information – PII (e.g., social security number or other private information) for other partners. If the returns are required, can the Department obtain them from the partnership?
The department will accept an affidavit or statement that provides the income subject to tax, the tax paid and resident credit if the entity has included the composite returns with its PA-20S/PA-65 return filing. We don’t allow another state’s K-1 showing tax withheld as proof of the tax credit. As previously noted, the entity is not providing the return it files in the other state as required by the instructions or our regulation.

With respect to the department making the request directly with the pass-through entity, the return being reviewed is the return of the individual claiming the credit. The partner/member/shareholder should make the request and have the information sent directly to the department if the returns contain personally identifiable information of other partners, members or shareholders.
We are receiving many notices requesting K-1s and other information already attached to PIT returns when they are filed. Providing the same information again is inefficient for both the taxpayer and the Department. Further, taxpayers receiving these notices are given the impression that the filing of the return was inaccurate or incomplete, when this isn’t the case. Is there a reason the information provided is not being associated with the returns and is generating notices? Please advise of the preferred method of attaching supplemental information to avoid further confusion or requests to re-submit.
This issue usually occurs when the department reviews a return with multiple K-1s and the income not matching the return as filed. It mostly occurs with electronically filed returns that don’t include statements that show the income reported from RK-1s and K-1s by entity by class of income to determine the differences. Therefore, the department requests the K-1s in these instances to verify a document was not missing. In some cases, the issue is probably a reporting difference by the taxpayer from an amount reported on the RK-1 received by the department.

The department requested software vendors to voluntarily provide statements by class of income by entity be sent with e-filed returns but few if any software vendors support and send those statements. Preparers should request their software vendors support the statements so that we can verify income amounts by entity by class of income. Until statements are sent with e-filed returns, preparers could attach PDF files of the statements that are produced for a printed return.
Question #11

When can we expect further guidance on federal tax reform issues, such as Sec. 163(j) and Qualified Opportunity Zones?
Answer # 11

The Corporate Tax Bulletin on Sec 163(j) was published April 29, 2019.

For the QOZ, guidance was given at the PICPA meeting in October 2018 that any gains deferred for federal tax purposes would have to be reported for PA PIT purposes. The PA PIT Guide has also been updated to reflect that.
Is the Department involved in tax-related legislative initiatives for which it may seek input from interested parties (e.g., PICPA, Bar Association, etc.)?
Answer # 12

The department reaches out to these associations for input on bulletins and other types of guidance. The department welcomes input into legislation that is introduced by the General Assembly.
Question #13

When does the Department expect to release draft market-based sourcing regulations?
The Department expects to conduct public outreach later this summer. PICPA is on the distribution list for public outreach.
Question #14

Can you share information on new employees/roles within the Department?
Josh Hulstine is the new director of the Bureau of Corporation Taxes. He replaces Tom Bordner who retired in March.

Suzanne Tarlini is the new director of the Taxpayer Registration Office. She replaces Josh Hulstine.
Question #15

The Department experiences extensive delays in terms of processing taxpayer requests, issuing decisions from the Boards, and answering phone inquiries (even after day-long attempts to reach a representative). It is not uncommon to hear an automated message at 10:30 a.m. stating: "the Department cannot handle any more calls today, please call back tomorrow." It can reportedly take 6-8 weeks for the Department to post an appeal adjustment to the taxpayer's account. Is the Department trying to address the systems causing these issues and if so, how?
Answer #15

Phones: There was a time when we first implemented the new phone system and the queues were not configured correctly and it was a fairly common to hear that message. We believed that this issue has since been resolved. If this is still an ongoing issue, what’s the phone number you’re calling and hearing this message?

Processing Taxpayer requests and Post Appeal processing: The department has made a concerted effort to make customer service one of our highest priorities. It would be beneficial if you could provide more details as that will allow us to address specific area(s) throughout the department that is not processing work in a timely manner.

If this is something you would rather address offline and provide the executive leadership with more specific details, I’m sure they would welcome the opportunity to see them and make sure corrective actions are taken.
Question #16

Would the Department consider instituting a tax practitioner hotline and/or allowing tax practitioners to access Statements of Accounts on E-Tides for corporate clients?
Answer #16

Unfortunately, we don’t have the resources to have a dedicated phone number for tax practitioners. There are a few handouts we provided today that will help you and your members to use some of the electronic services we have available to you and your members.

However, I do have some bonus information to mention today. We are working with our new phone vendor to try to implement a feature we are calling Web-Call Back. This feature will allow a practitioner to go to our web site and select a date and time for one of our customer service representatives to call you back. We are currently in the user acceptance testing phase of the project and once we are sure the product is working properly, we will do a rollout with our practitioner associations to advertise the service to your members.
Taxation Reorg Update
Tax System Modernization
In Scope Taxes and Programs

- IFTA/Motor Carrier
- Motor and Alternative Fuel Taxes
- Inheritance Tax
- Realty Transfer Tax
- Medical Marijuana Tax
- Voluntary Disclosure Program
- Personal Income Tax
- Property Tax/Rent Rebate
- Pass Through Entity
Project Status – Rollout 1

• Production Statistics
  • 25,571 returns and renewals processed
  • 14,211 payments received for over $900M
  • Over 4,000 notices issued

• myPATH Statistics
  • 4,414 returns filed via myPATH
  • Over 3,700 customers signed up
  • 2,418 payments for over $700M received via myPATH

Above statistics are as of 5/1/19
Project Status – Rollout 2

- Rollout 2 planning and preparation completed
- Teams Finalized – new members from each group; over 55 fulltime
- Held rollout 2 kick-off event
- Definition, Base configuration, and Development underway
- Mock conversion slices created and reviewed weekly
- Assessing change management and communication needs throughout
Upcoming Project Activities

- Functional Feedback sessions
- Continue iterative development, including letters, interfaces, and reports
- Continue mock conversions
- Preparation for business testing
Communications and Outreach

• MAFT taxpayers
  • Mailings and emails
  • Flyers at regional offices
  • Direct outreach by field agents
• Continued updates at stakeholder meetings
• DOR website and Tax Updates
Allison Morgan, Project Director
allmorgan@pa.gov
717-346-1780

Meggan Swisher, Business Program Director
mswisher@pa.gov
717-787-4573
Thank You!