



**pennsylvania**  
DEPARTMENT OF REVENUE

# TAX UPDATE

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Tax Update is a bi-monthly e-newsletter published  
by the Pennsylvania Department of Revenue

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**Governor**  
Tom Wolf

**Secretary of Revenue**  
C. Daniel Hassell

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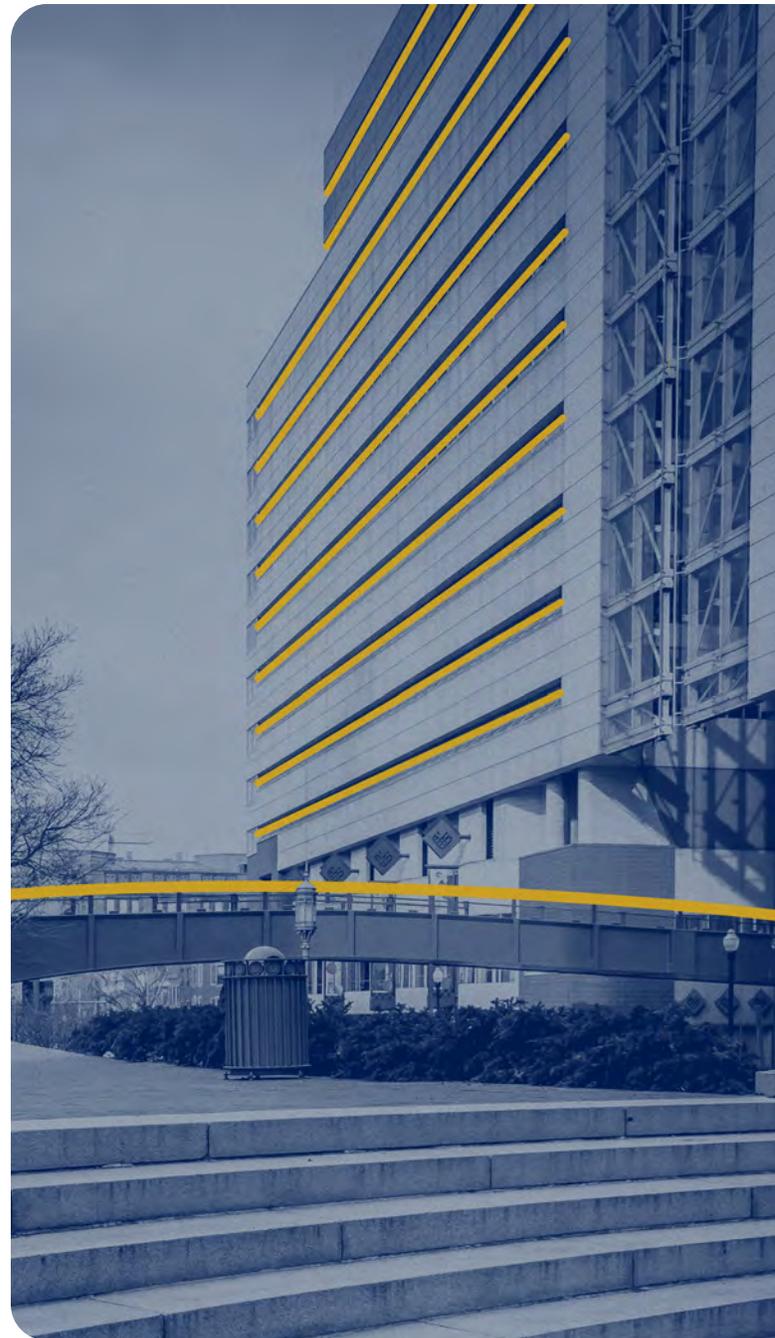
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**The No. 1 goal in the department's strategic plan is to continually improve customer service.**

- Revenue Secretary Dan Hassell

## DALE SIMPSON APPOINTED ACTING DEPUTY SECRETARY FOR COMPLIANCE AND COLLECTIONS



Dale Simpson, Acting Deputy Secretary for Compliance and Collections

**Dale Simpson, who has more than 27 years of experience** with the Department of Revenue, has been appointed the department's Acting Deputy Secretary for Compliance and Collections. Simpson is taking over for Radee Skipworth, who left the department to become the Director of Collections and Enforcement for the District of Columbia Office of Tax and Revenue.

"Dale has proven himself as a valuable asset for Revenue's team," Revenue Secretary Dan Hassell said. "I'm certain his experience and the positive attitude that he brings to work every day will continue to serve him well in a new leadership position."

Simpson began his tenure with the Department of Revenue in 1993 as a Tax Account Collections Technician in Pittsburgh. Since that time, he has emerged as a leader within the department, particularly when it comes to work in the field.

Simpson has worked in several different capacities focusing on compliance and collections efforts. Most recently, he has served as director of the Bureau of Enforcement and Taxpayer Assistance. In that role, Simpson has played a leading role in the department's home headquartering project, which involves field agents prioritizing interactions with taxpayers in the field by making their homes their main offices. This initiative has been a great success and was expanded significantly as Revenue employees have worked remotely during the COVID-19 pandemic.

Simpson also was a leader in the launch of a pilot program that involves taxpayer assistance staff traveling to community centers throughout the state to provide in-person taxpayer assistance. Launched earlier this year, this is an initiative the department plans to expand in the future so that its staff can deliver exceptional customer service to taxpayers by visiting convenient locations within their communities.

In his new role as Acting Deputy Secretary for Compliance and Collections, Simpson will continue to oversee these efforts along with the overall compliance and collections functions of the department. 📌

“  
**DALE HAS PROVEN HIMSELF**  
as a valuable  
asset for  
**REVENUE'S TEAM...**

- Revenue Secretary  
Dan Hassell

## DEPARTMENT OF REVENUE CONTINUES PROVIDING CUSTOMER SERVICE FOR PENNSYLVANIANS DESPITE CHALLENGES OF COVID-19 PANDEMIC

With the majority of its employees teleworking due to the COVID-19 pandemic, the Department of Revenue continues working hard to deliver the customer service that Pennsylvanians need. The department has worked closely with the Office of Administration and other officials within the Wolf Administration throughout the pandemic to provide its employees with the equipment and tools they need to perform their jobs.

“We want our customers to know that we’re here to help them and answer their questions, even though we’ve had to adapt many of our operations due to the pandemic,” Revenue Secretary Dan Hassell said. “Providing exceptional customer service is our top priority, and we have a number of options available online, over the phone and in person to connect our taxpayers with the assistance and information they need.”

Throughout the pandemic, state agencies have followed guidance for businesses issued by the Governor and Secretary of Health, including the recommendation for employees to telework, if possible. Approximately one-third of commonwealth employees are either teleworking full-time or splitting their time between telework and working onsite based on their job duties. The Office of Administration has also developed **resources to support employees and supervisors while teleworking**.

The majority of Department of Revenue employees have been teleworking since mid-March. As of mid-September, the department has:

- **Approved 439,820 rebates for the Property Tax/Rent Rebate (PTRR) Program totaling approximately \$208.5 million** – The department has continued to process claims for the **Property Tax/Rent Rebate Program**, which provides support to older homeowners and renters with disabilities. Additionally, **more than 310,000 of the rebates processed this year were paid earlier than the normal July 1 distribution date** to provide needed financial relief during the pandemic. Additionally, staff from the department’s Customer Experience Center placed more than 235,000 calls to PTRR claimants to notify them the department received their claims, and more than 257,000 calls to claimants notifying them they would be receiving their rebates early.

- **Processed Pennsylvania personal income tax returns and payments on schedule** – As of mid-September, the department had received nearly 6.5 million personal income tax returns. Many of those returns arrived later than usual because the department **extended the due date for filing returns to July 15, 2020** to provide more time for taxpayers during the pandemic. The majority of returns and refund requests have been processed on the normal schedule. This has provided Pennsylvania taxpayers with their refunds at a time when they may need it most.
- **Collected \$6.6 billion in General Fund revenue in the first two months of the new fiscal year** – During the month of July, the department collected \$4.1 billion in General Fund revenue, and it followed that by collecting another \$2.5 billion in August. Initially, it was believed there would be a delay in processing and depositing work that would stretch to September, however staff at the department’s scanning and imaging facility worked quickly and efficiently to complete this work by the end of July. This ensured funds for essential services continued to flow and that the state Treasury received a needed financial boost during the pandemic.
- **Established a new customer support system** – Revenue staff and information technology employees from the Office of Administration developed a new approach to push inbound calls to the Skype for Business phone platform. This allowed DOR field personnel and other staff who were already equipped with laptops to assist with calls from Property Tax/Rent Rebate Program claimants. This helped to provide the customer service that was needed even though employees were teleworking.
  - As of mid-September, Customer Experience Center staff has answered nearly 60,000 online inquiries through the department’s **Online Customer Service Center** and made 8,735 calls through its **Schedule a Call** service.
  - Customer Experience Center staff responded to nearly 77,000 phone calls in May, June, July and August. Additionally, nearly 114,000 customers used the department’s automated self-service options via phone in the same timeframe.
  - The department’s Bureau of Enforcement and Taxpayer Assistance (BETA) also assisted answering phone calls and emails from taxpayers. As of mid-September, BETA employees have answered 33,321 incoming calls, addressed 18,815 voicemails and have met with 2,218 taxpayers in-person since reopening the department’s district offices for in-person taxpayer assistance. Hundreds of these in-person interactions were to provide Pennsylvanians with PTRR filing help or income tax filing assistance.

**GENERAL FUND  
first two months of  
the new fiscal year**

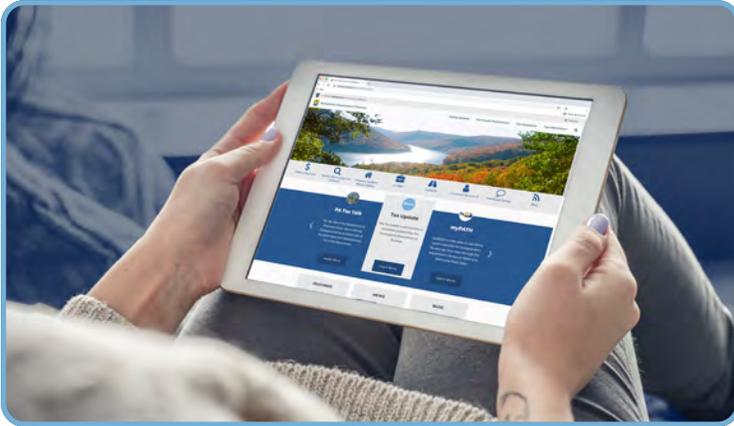
**\$6.6 BILLION**

## DEPARTMENT OF REVENUE CONTINUES PROVIDING CUSTOMER SERVICE FOR PENNSYLVANIANS DESPITE CHALLENGES OF COVID-19 PANDEMIC

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### Tax Help Online and Over the Phone

The Department of Revenue offers help through its **Online Customer Service Center**. This online option provides taxpayers with answers to specific questions about a number of tax-related topics. It also provides an option to submit a question to a Department of Revenue representative through a secure, electronic process that is similar to sending an email.



In addition to online assistance, the Department of Revenue's Customer Experience Center is available by calling 717-787-8201. The call center is open 8 a.m. to 5 p.m. on weekdays. Taxpayers may also **schedule a call** at a time that is convenient for them.

Free tax forms and instructions are available at [www.revenue.pa.gov](http://www.revenue.pa.gov). You can also visit the department's pages on **Facebook**, **Twitter** and **LinkedIn** for helpful tax information.

### Find In-Person Taxpayer Assistance

Taxpayers who need in-person assistance will need to schedule an appointment at one of the Department of Revenue's district offices. The department is asking taxpayers to make appointments to assist with social distancing and other health protocols due to the COVID-19 pandemic. Visit the **COVID-19 information page** on the department's website for information on availability and a list of the district offices that are currently accepting appointments. 📌



## NEW POLICY DIRECTOR JOINS DEPARTMENT OF REVENUE

**Jacob Derrick has been appointed** the Department of Revenue's Policy Director. Derrick joins the department after working as a Business Transformation Specialist for the Pennsylvania Department of General Services (DGS). In this role, he worked with DGS' leadership team and staff to implement change management principles and business solutions. He accomplished this by forging strong relationships with his colleagues and encouraging them to use data to inform their decisions in solving agency issues.

Derrick is also very familiar with the Department of Revenue as he spent four years working as a Policy Specialist in the Governor's Policy Office after Governor Wolf was elected. In that role, he oversaw policy directors in seven state agencies, including the Department of Revenue. That experience provided Derrick a close view of the department's mission, goals for the future and the critical functions the department performs for the citizens of the commonwealth.

As Policy Director, Derrick will be responsible for monitoring federal and state legislation and measuring the impact of policy and legislative proposals. His work will also include advancing tax policy proposals that will help the department operate more efficiently and improve compliance. Moreover, Derrick will help guide the department's decisions as it continues working to administer the commonwealth's tax laws and revenue programs fairly, efficiently and accurately. 📌



..... Jacob Derrick, Policy Director

## NEW FILING OPTIONS FOR PERSONAL INCOME TAX, PROPERTY TAX/ RENT REBATE PROGRAM ON SCHEDULE TO LAUNCH IN DECEMBER 2020

Despite the operational challenges created by the COVID-19 pandemic, the Department of Revenue's modernization project is on schedule to provide new filing options in December 2020 for personal income tax and the Property Tax/Rent Rebate Program.

The department's modernization project team is hard at work to install these taxes and the PTRR program into the Pennsylvania Tax Hub (PATH), the tax system the department initially launched in early 2019 for other tax types. This latest phase of the project is the biggest to date and will offer user-friendly filing options through **myPATH**, the self-service portal the department offers online.

"We are excited to offer the benefits of this system to more of our customers, including more than 6.5 million taxpayers who annually file Pennsylvania personal income tax returns," Revenue Secretary Dan Hassell said. "Our project team has done a great job of keeping us on schedule and on budget despite the fact that they have been teleworking since mid-March due to the pandemic. We are confident the new filing options will be a great benefit for our customers."

### Pennsylvania Personal Income Tax

Starting in December, taxpayers will have the option to file their Pennsylvania personal income tax returns for free through **myPATH**. That means taxpayers who requested an extension to file their 2019 Pennsylvania personal income tax returns will be able to utilize the new system.

Additionally, the system will be available in 2021 for taxpayers filing their 2020 Pennsylvania personal income tax returns. **myPATH** will replace the Pennsylvania Department of Revenue's prior personal income tax filing system, **Padirectfile**.

Features **myPATH** offers to Pennsylvania personal income tax filers include:

- Fast and free return/refund processing
- The "**Where's My Refund?**" system to track the status of a refund
- Instant confirmation of a successful filing
- The benefit of error-reducing automatic calculators
- User-friendly options that are not available to taxpayers filing by paper

- The ability to view detailed Statement of Account for personal income tax
- Verifying 1099 amounts, changing 1099 delivery preferences and viewing complete 1099s

### Property Tax/Rent Rebate Program

Starting in December, **myPATH** will offer an electronic filing option for claimants of the Property Tax/Rent Rebate Program. This will be the first time in the history of the program that there is an electronic filing option available for the Pennsylvanians who benefit from this program.

Eligible claimants who have not submitted their applications for the 2019 claim year by December will have the option to submit their 2019 applications using **myPATH**. That will help claimants prior to the deadline of December 31, 2020 to submit claims from 2019. The new system will also be in place for eligible claimants as the 2020 claim year begins in January 2021.

Other features **myPATH** offers for Property Tax/Rent Rebate claimants:

- Fast processing and direct deposit options
- The "**Where's My Rebate?**" system to track the status of a claim online
- The benefit of error-reducing automatic calculators
- User-friendly features that are not available when filing a paper application

Visit the **Property Tax/Rent Rebate Program** page on the department's website for more information on the program and eligibility.

### Other Filing Options in myPATH

The new filing options that are coming in early 2021 will join other tax-filing options already available through **myPATH**.

The department announced in February 2019 that **the system was available for taxpayers with tax obligations for motor and alternative fuels**. That includes the International Fuel Tax Agreement (IFTA), Motor Carrier Road Tax (MCRT), Motor Fuel Tax, Alternative Fuels Tax and PA Fuel Transporter.

Following that announcement, the department announced in October 2019 that **myPATH is a resource available for county offices with Realty Transfer Tax and Inheritance Tax obligations**. Additionally, at that time **myPATH** became available for Medical Marijuana growers/processors who are responsible for remitting Medical Marijuana Tax.

For more information on the **myPATH** project, please visit [revenue.pa.gov/mypathinformation](https://revenue.pa.gov/mypathinformation).



## ..... DEPARTMENT OF REVENUE OFFERS TAX WEBINARS .....

- 1** **OCTOBER 27**  
Part One 1pm - 4pm  
**OCTOBER 29**  
Part Two 1pm - 4pm  
Sponsored by Pennsylvania  
Society of Tax and  
Accounting Professionals  
Registration Information

- 2** **NOVEMBER 4**  
Part One 1pm - 4pm  
**NOVEMBER 5**  
Part Two 1pm - 4pm  
Sponsored by Wilkes  
University  
Registration Information

- 3** **DECEMBER 16**  
Full Day Session  
8am - 4:30pm  
Sponsored by Penn State  
University Abington  
Registration Information

For additional registration  
information and general  
information, please visit  
[revenue.pa.gov/taxseminars](https://revenue.pa.gov/taxseminars)

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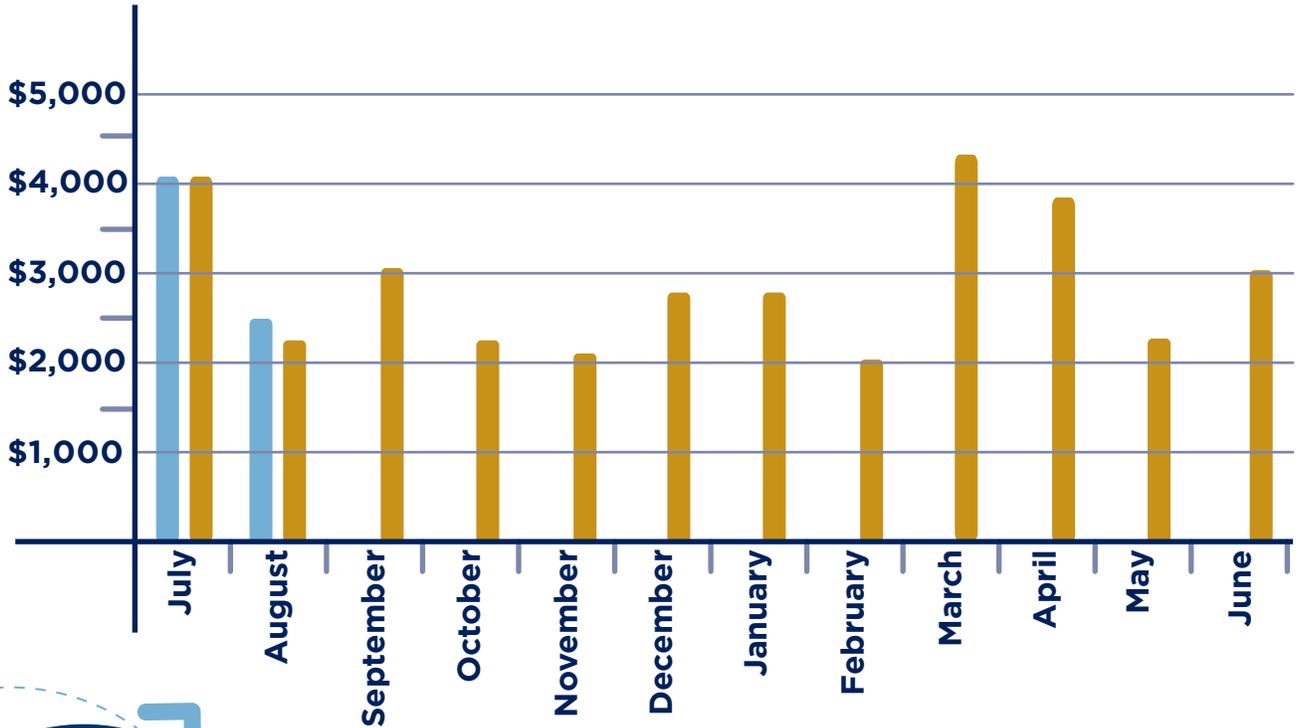
## 2020-2021 General Fund Revenues

*Estimated vs. Actual Revenue Collections (in millions)*

**Through August, General Fund collections totaled \$6.7 billion in 2020-21**

Actual Revenue

Estimated Revenue



**GRAPH**

**ACTUAL FIGURES**  
*(in millions)*

Month	Actual Revenues	Estimated Revenues
July	4,104	4,103
August	2,548	2,339
September		3,013
October		2,227
November		2,126
December		2,720
January		2,773
February		2,011
March		4,239
April		3,802
May		2,254
June		3,026