



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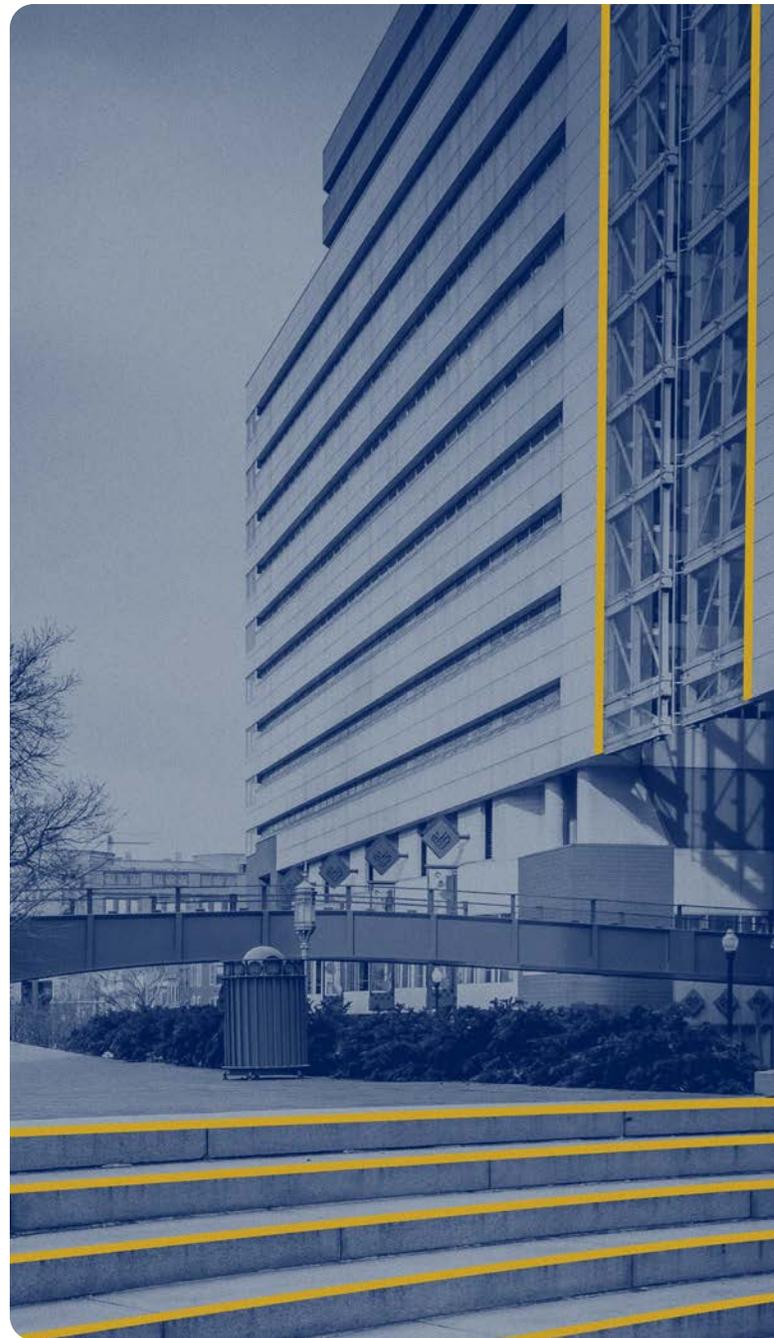
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The No. 1 goal in the department's strategic plan is to continually improve customer service.

- Revenue Secretary Dan Hassell

REVENUE SECRETARY NAMED TO BOARD FOR THE FEDERATION OF TAX ADMINISTRATORS

Department of Revenue Secretary Dan Hassell was recently named to the Board of Trustees of the Federation of Tax Administrators (FTA), an organization that provides services to state tax authorities and administrators.

“Being a member of the FTA Board of Trustees will be another way for our agency to stay engaged with our tax administration colleagues in other parts of the country,” Secretary Hassell said. “We have benefitted greatly in recent years from this ongoing dialogue with other FTA members, and I’m looking forward to participating in those conversations in this new role.”

FTA serves the principal tax collection agencies of the 50 states, the District of Columbia, Philadelphia, and New York City. The work of FTA is directed and governed by an 18-member Board of Trustees composed of tax administrators representing all regions of the country.

FTA serves as a source of information and expertise for state administrators and others on the workings of state

tax agencies and systems as well as issues generally affecting tax policy and administration. FTA staff regularly monitors the activities of state tax agencies and the federal government in order to serve as a clearinghouse on topics important to administrators. FTA also conducts research projects in such areas as state tax policies and structures, compliance and enforcement programs, and federal and state court decisions. In addition, significant effort is devoted to inquiries from tax administrators on special problems and issues.

FTA was originally organized in 1937 to improve the quality of state tax administration. The Department of Revenue’s involvement with the organization allows its leaders to stay informed on how other agencies are addressing taxation, enforcement and modernization, among other topics. This helps the department fulfill its mission of fairly, efficiently, and accurately administering the tax laws and other revenue programs of the Commonwealth of Pennsylvania. 📌



Department of Revenue Secretary Dan Hassell

“Being a member of the FTA Board of Trustees will be another way for **our agency to stay engaged** with our tax administration colleagues in other parts of the country...”

DEPARTMENT ACKNOWLEDGES RETIREMENT OF DAVID BRADEN

The Department of Revenue recently acknowledged the retirement of David Braden, who was well known in the community of tax professionals and practitioners due to his frequent participation in conferences across Pennsylvania. Braden often served as a guest speaker and representative of the department at these events, sharing the latest updates on state tax administration and legislation. Braden retired with 31 ½ years of service to the commonwealth.

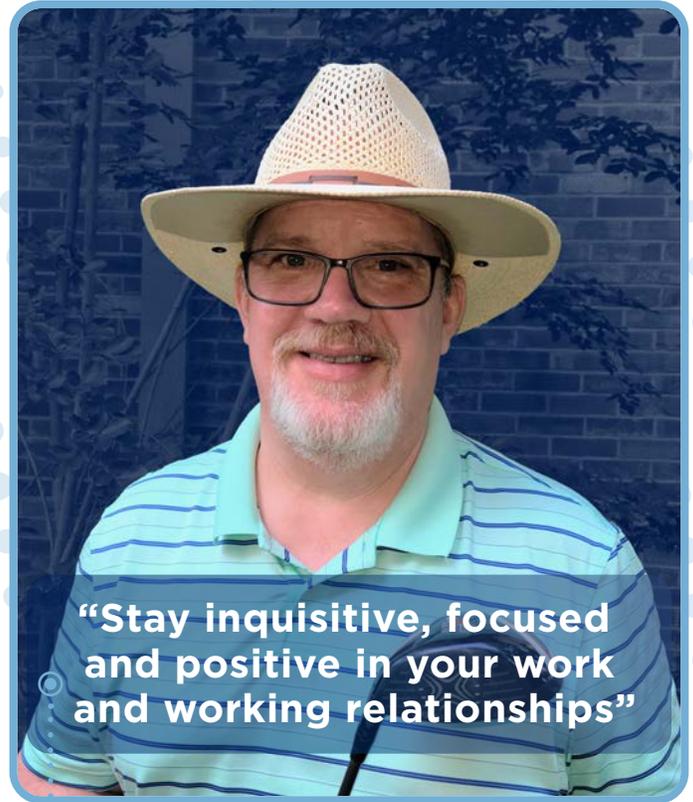
Braden began his career in state government in 1990 at the Pennsylvania Treasury Department Office of Fiscal Review. In April of 1996, he became an Audit Manager and was responsible for the review of personal income tax refunds and Property Tax/Rent Rebate Program claims. In June 2004, Braden joined the Department of Revenue as the Assistant to the Director for the Bureau of Individual Taxes. In this position, he specialized in personal income tax issues and played a leading role in assisting taxpayers and tax professionals with PIT questions.

Braden also served as an integral part of the department’s education and outreach efforts as a recurring speaker at the department’s Fall Tax seminars. Braden was also known to go above and beyond to assist members of the Pennsylvania Institute of Certified Public Accounts (PICPA) and the Pennsylvania Society of Tax & Accounting Professionals (PSTAP) with questions related to individual taxes.

“Stay inquisitive, focused and positive in your work and working relationships,” Braden wrote in a parting message to his Revenue colleagues. “More importantly, stay safe, stay well and keep your head held high. Better days are ahead for all of us.”

Braden said he plans to continue working for himself and characterized his retirement as, “merely moving on to other adventures and activities in my life.”

The Department of Revenue’s executive staff thank Braden for his service and wish him well in his retirement. 🍷



David Braden

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**on social
MEDIA!**

 [linkedin.com/company/parevenue](https://www.linkedin.com/company/parevenue)

 @parevenue

 /padepartmentofrevenue



DOR FRAUD DETECTION AND ANALYSIS UNIT RECOGNIZED FOR PARTICIPATION IN ISAC

The Department of Revenue's Fraud Detection and Analysis Unit recently was recognized for helping the Identity Theft Tax Refund Fraud Information Sharing and Analysis Center (ISAC) reach an important milestone in its history. Staff from the Fraud Detection and Analysis Unit recently made the 1,000th alert on the ISAC secure portal, which is used to share information on scams and report fraud with stakeholders in the state and federal governments, as well as the private sector.

"When the Department of Revenue became an ISAC partner, we began by watching what others were sharing in the ISAC. Once we started downloading the data and running it through our systems, we realized we were able to identify and stop fraud based on the information shared by other ISAC partners," Revenue Secretary Dan Hassell explained. "We noticed as more partners shared, we were able to see large schemes emerging. We realized we had additional data that would help all partners build the characteristics of these schemes and therefore our participation evolved from watching and using data to sharing and teaching."

The ISAC was launched on Jan. 27, 2017 during the opening of the 2017 tax filing season. ISAC Partner Intuit posted the very first alert in the ISAC portal. The alert shared suspicious activity identified by Intuit with the other 18 partner organizations in the ISAC. It was a bold and significant landmark event for the ISAC and the beginning of a growing, trusting relationship among separate entities who had limited insight into suspicious activity identified across the tax ecosystem.

Five years later, the ISAC has 72 partner organizations and more than 450 ISAC users. Allen Daugherty, the manager of the Department of Revenue's Fraud Detection and Analysis Unit, is an integral part of his agency's participation in the ISAC.

"In previous years, Pennsylvania was more of a consumer of the information shared within the ISAC. This year we made it a team commitment to be more of a participant in sharing and have posted 22 alerts since January," Daugherty said. "Secretary Hassell and his entire executive staff have taken the time to understand the ISAC and the data being shared and the full weight of the agency has been dedicated to providing additional resources so that we can have a more concerted effort in sharing in the ISAC."

"The communications and data that the ISAC secure portal fosters and provides is critical for our mission and values. It makes the invisible, visible," said Revenue fraud analyst Julie Welsch, who also works in the Fraud Detection and Analysis Unit. "If we see something in Pennsylvania, we need to say something so all ISAC partners can search their own systems and then share any pertinent information they may find. One single alert can truly make the difference, which is why we all need to make the effort to share."

The ISAC secure portal thrives on consistent participation, good communication and sharing timely data from all ISAC partners. Sharing just one data point or pattern can help ISAC partners and users discover fraudulent activity, alert others and ultimately protect taxpayers.

Taxpayer security and scam detection are extremely important issues for the Department of Revenue, which is why the department launched the Fraud Detection and Analysis Unit in 2016. This specialized unit is tasked with assisting victims of identity theft and combatting tax refund fraud, monitoring known and newly discovered types of tax fraud, and helping the department by strengthening its automated fraud filters. This work helps to intercept fraudulent and erroneous tax refund filings.

It is extremely important to report identity theft as soon as you are aware of it. If you are a victim of identity theft or discover a fraudulent Pennsylvania personal income tax return was filed using your identity, please contact the Fraud Detection and Analysis Unit at 717-772-9297 or RA-RVPITFRAUD@pa.gov. 📧



2021 DEPARTMENT OF REVENUE TAX SEMINARS

The Department of Revenue's annual series of Tax Seminars officially kick off in September. Tax professionals are encouraged to learn about changes to state tax laws and policies during one-day seminars held across the state and virtually.

The tax seminars educate tax professionals on personal income tax, sales tax, corporate taxes, compliance

initiatives and using the department's website to establish tax accounts for new businesses, file tax returns and pay state taxes.

The schedule below includes a listing of seminar dates and locations. You can also find updated information — including hyperlinks for the virtual seminars — by visiting the **Tax Seminars page** on the Department of Revenue's website.

| Dates | Conference Location | Sponsor | Contact |
|--------------|---|--|---|
| September 23 | Homewood Suites by Hilton Allentown Bethlehem 3350 Center Valley Parkway Center Valley, PA 18034 | Lehigh Valley PSTAP | Sherry DeAgostino 800-270-3352 sherry@pstap.org |
| September 30 | Wyndham Gettysburg 95 Presidential Circle Gettysburg, PA 17325 | South Central Chapter PSTAP | Sherry DeAgostino 800-270-3352 sherry@pstap.org |
| October 5 | Radisson Penn Harris Hotel & Convention Ctr 1150 Camp Hill Bypass US 15 Camp Hill, PA 17011 | Harrisburg PSTAP | Sherry DeAgostino 800-270-3352 sherry@pstap.org |
| October 20 | DoubleTree by Hilton Reading 701 Penn Street Reading, PA 19601 | Central Chapter PSTAP | Sherry DeAgostino 800-270-3352 sherry@pstap.org |
| October 21 | Cranberry Regional Learning Alliance Center 850 Cranberry Woods Dr Cranberry Township, PA 16066 | Pittsburgh PSTAP | Sherry DeAgostino 800-270-3352 sherry@pstap.org |
| October 28 | Springfield Country Club 400 W. Sproul Rd (Rte 320) Springfield, PA 19064 | Philadelphia Tri-County PSTAP | Sherry DeAgostino 800-270-3352 sherry@pstap.org |
| November 3 | Virtual (link not yet available) | PSTAP | Sherry DeAgostino 800-270-3352 sherry@pstap.org |
| November 9 | 1/2 Day Virtual (link not yet available) | Wilkes University Continuing Education Dept. | Margaret Petty 570-408-4460 margaret.petty@wilkes.edu |
| November 12 | 1/2 Day Virtual (link not yet available) | Wilkes University Continuing Education Dept. | Margaret Petty 570-408-4460 margaret.petty@wilkes.edu |
| December 6 | The Woodlands Inn and Resort Highway 315 Wilkes-Barre, PA 18766 | Wilkes University Continuing Education Dept. | Margaret Petty 570-408-4460 margaret.petty@wilkes.edu |
| December 15 | Virtual (link not yet available) | McDevitt & Kline | Bill Kline 570-251-3805 william.kline@ceworkshops.com |

TAXPAYER ASSISTANCE AVAILABLE AT REVENUE DISTRICT OFFICES, ONLINE AND BY PHONE

Department of Revenue district offices are open for taxpayers who need in-person assistance, Monday through Friday from 8:30 a.m. to 5 p.m.

Scheduling an Appointment

Taxpayers in need of in-person assistance are required to call or email the district office closest to them to schedule an appointment. A list of Revenue district offices can be found below or by visiting the department's **District Offices page** on its website, revenue.pa.gov.

Online Customer Service Center

The Department of Revenue is also encouraging taxpayers to use its Online Customer Service Center, available at revenue-pa.custhelp.com. This resource can be used to electronically submit a question to a department representative. A department representative will be able to respond through a secure, electronic process that is similar to receiving an email. Additionally, the Online Customer Service Center includes thousands of answers to common tax-related questions.

Schedule a Call or Call the Customer Experience Center. Taxpayers and tax professionals are encouraged to use the department's Schedule a Call service. This service allows customers to select a date and time that works for their schedule to receive a call from the Department of Revenue. Once a selection is made, the requested call will be assigned to a representative from the department's Customer Experience Center (CEC).

If you are using the Schedule a Call service, please keep in mind that your requested phone call may be made within a few minutes of your scheduled time. Department representatives will work as quickly as possible to maintain the schedule, but the volume of requests may be a factor.

The CEC call center is also operational and can be reached at 1-888-728-2937 or between the hours of 8 a.m. to 5 p.m. 📞

REVENUE OFFICES ACCEPTING APPOINTMENTS

Allentown

555 UNION BLVD
ALLENTOWN PA 18109-3389
610-861-2000
RA-RV-BET-BET-DO-EM@pa.gov

Erie

448 W 11TH ST
ERIE PA 16501-1501
814-871-4491
RA-RV-BET-ERI-DO-EM@pa.gov

Greensburg

15 W THIRD ST SECOND FL
GREENSBURG PA 15601-3003
724-832-5283
RA-RV-BET-GBG-DO-EM@pa.gov

Harrisburg

STRAWBERRY SQ LOBBY
HARRISBURG PA 17128-0101
717-783-1405
RA-RV-BET-HBG-TA-EM@pa.gov

Norristown

STONY CREEK OFFICE CENTER
151 W MARSHALL ST SECOND FL
NORRISTOWN PA 19401-4739
610-270-1780
RA-RV-BET-NOR-DO-EM@pa.gov

Philadelphia - Center City ***

110 N 8TH ST STE 204A
PHILADELPHIA PA 19107-2412
215-560-2056
RA-RV-BET-PHI-TA-EM@pa.gov

Philadelphia - Northeast

ACDMY PLZ SHPG CTR
3240 RED LION RD
PHILADELPHIA PA 19114-1109
215-821-1860
RA-RV-BET-PNE-DO-EM@pa.gov

Pittsburgh - Greentree

11 PARKWAY CTR STE 175
875 GREENTREE RD
PITTSBURGH PA 15220
412-929-0614
RA-RV-BET-GTR-DO-EM@pa.gov

Pittsburgh - Downtown

411 7TH AVE ROOM 420
PITTSBURGH PA 15219-1905
412-565-7540
RA-RV-BET-PGH-TA-EM@pa.gov

Reading

625 CHERRY ST STE 239
READING PA 19602-1186
610-378-4401
RA-RV-BET-RDG-DO-EM@pa.gov

Scranton

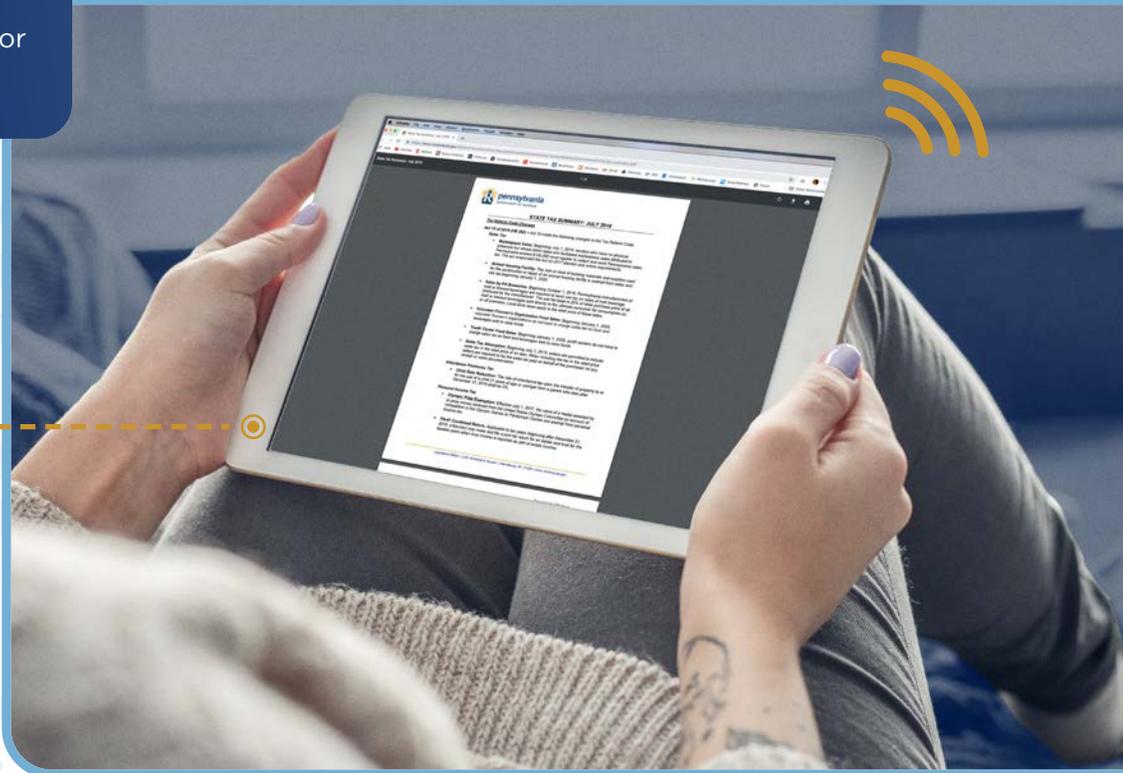
BANK TOWERS
207 WYOMING AVE RM 207
SCRANTON PA 18503-1427
570-963-4585
RA-RV-BET-SCR-DO-EM@pa.gov

*** (Inheritance Tax Office in Ste 204B)

2021 STATE TAX SUMMARY - JULY

A summary of relevant legislation enacted during the recent legislative session is now available on the Pennsylvania Department of Revenue website.

Click on the image to the right for more information. 📄



REACH OUT TO FAMILY AND FRIENDS

TO HELP PUT A STOP TO COVID-19.
GETTING YOUR VAX IS QUICK, EASY, AND SAFE.
APPOINTMENTS AVAILABLE TODAY NEAR YOU.

[PA.GOV/COVID](https://pa.gov/covid)

[#PAAGAINSTCOVID](https://twitter.com/PAAGAINSTCOVID)

PA UNITES
AGAINST
COVID

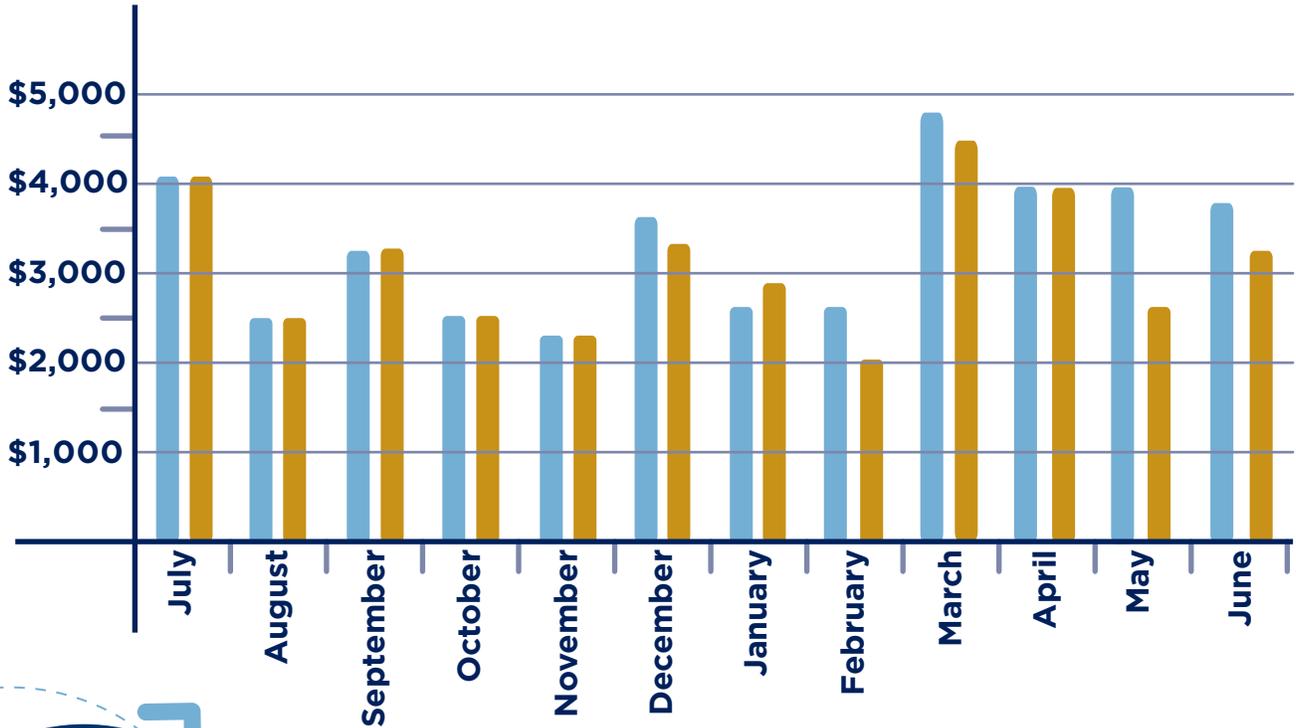
2020-2021 General Fund Revenues

Estimated vs. Actual Revenue Collections (in millions)

General Fund collections totaled \$40.4 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 | 2,537 |
| September | 3,262 | 3,271 |
| October | 2,592 | 2,595 |
| November | 2,339 | 2,338 |
| December | 3,684 | 3,216 |
| January | 2,658 | 2,821 |
| February | 2,684 | 2,090 |
| March | 4,843 | 4,465 |
| April | 3,962 | 3,934 |
| May | 3,947 | 2,386 |
| June | 3,768 | 3,200 |