

Electronic Revenue Clearance Form Instructions for Tax Credit and Economic Development Programs

Overview

All tax credit and incentive programs require applicants to be in state tax compliance with the laws and regulations of the commonwealth as determined by the Department of Revenue.

The two issues for determination are entity tax compliance and ownership tax compliance for entity owners with a 20% or greater share of ownership. Failure to comply to the satisfaction of the department will result in disqualification from the program.

Businesses that may be eligible for multiple programs in a calendar year are required to file a new compliance form for each program.

Electronic Filing Requirement

In our continuing effort to promote “Government that Works,” the paper Clearance worksheet has been replaced with the Electronic Revenue Clearance Form. The deployment of this web-based form ensures that tax identification numbers are securely collected by the Department of Revenue for the compliance review. The Department will not accept the clearance worksheet or clearance form in any other format.

Help and Assistance

Contact ra-rvtaxcredits@pa.gov or call 717-772-3896 with any questions concerning this application.

Accessing the Clearance Form

The clearance form is accessible 365 days per year by visiting www.revenue.pa.gov/taxcredits and selecting the Clearance Form for Tax Credits button on the webpage.

Required Sections and Submission

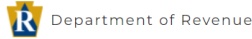
The electronic clearance form contains three primary sections and requires e-signature confirmation for submission.

1. Section I: General Information
2. Section II: Shareholder/ Partner / Member Information
3. Section III: Authorization
4. Clearance Form Submission Page

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SECTION I: GENERAL INFORMATION

1. “Select the program name” from a drop-down menu. If the name of the program is not listed, please select “Other” and type the name of the program in the space provided.



Step 1 of 3

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NOTE: Please keep in mind that web forms will only work with certain web browsers. If you experience problems with Internet Explorer, please try using Chrome, Safari, Microsoft Edge or another supported web browser.

SECTION I: GENERAL INFORMATION

Required fields are marked with an asterisk.*

Program Name *

If Other, Please Specify

2. Applicant Identification: The next set of fields require identification of the applicant as a business or as an individual and the associated tax identification numbers.

Enter the applicant's name as registered under the Federal Employer Identification Number or Social Security Number.

If Applicant is a Business: Enter business name below. Then select your business/entity type from the drop-down list.

Business Name *

Business/Entity Type *

If Applicant is an Individual: Enter N/A for "BUSINESS NAME" above. Then, select "Individual" from the drop-down list for "BUSINESS/ENTITY TYPE". Be sure to complete the "FIRST NAME" and "LAST NAME" fields below.

First Name

Last Name

- If Applicant is a Business: Enter business name. Then select your business/entity type from the drop-down list.
 - If Applicant is an Individual: Enter N/A for "BUSINESS NAME" . Then, select "Individual" from the drop-down list for "BUSINESS/ENTITY TYPE" and complete the "FIRST NAME" and "LAST NAME" fields.
3. Select EIN or SSN under “TAX NUMBER TYPE” drop down menu and enter the EIN or SSN in “TAX NUMBER” field and the PA Revenue Number if applicable.

Tax Number Type *

Tax Number *

PA Revenue Number

NOTE: Only enter numbers in the “TAX NUMBER” field. Any special characters or letters will result in an error.

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4. Business or Applicant Demographics: All fields with an Asterix are required for the Address, Phone Number and Email Address of the applicant requiring tax clearance.

Address Line 1 *	Address Line 2	
City *	State *	Postal Code *
Phone Number (XXX-XXX-XXXX) *	Extension	
Email Address *	Application ID	

NOTE: Invalid or incorrect phone or email address information could result in delay of processing or automatic rejection of the clearance request. If you do not know your Application ID, please leave the field blank.

5. Captcha: To proceed to the Section II, the captcha image must be completed, prior to clicking the Next button.



Generate a new image

Play the audio code

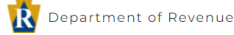
Enter the code from the image

Next

NOTE: Missing or incorrectly entered information will result in an error and will not allow you to proceed until corrections have been made.

SECTION II: SHAREHOLDER / PARTNER / MEMBER INFORMATION

1. Any owner that is a 20% or greater stakeholder, member, or partner in the business seeking tax compliance status must be included in the submission of the clearance form.
2. To proceed with the section, select the Add Shareholder Button.



Step **2** of **3**

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Shareholder Information and Authorization

SECTION II: SHAREHOLDER / PARTNER / MEMBER INFORMATION

Select "Add Shareholder" to enter information for any owner that is a 20% or greater stakeholder, member, or partner in the business seeking tax compliance status. A summary of your entries will be shown below.

Note: The entity will be deemed non-compliant if any shareholder, partner, or member with a 20% or greater ownership interest fails the clearance for tax compliance. Incomplete or missing tax information will result in application non-compliance. Provide first and last names if ENTITY TYPE is a Sole Proprietor or an Individual.

Add Shareholder

Entity Name	First Name	Last Name	Ownership %	Email Address
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3. The Shareholder/Partner/Member Information page must be completed for each 20% or greater stakeholder, member or partner.

Shareholder / Partner / Member Information

Entity Type

Entity Name First Name Last Name

Tax Number Type * Tax Number (Numbers Only) * Ownership % (Must be greater than 20%. Numbers only.)

Address Line 1 *

Address Line 2

City * State/Province * Postal Code * Country

International Calling Code Phone Number (XXX-XXX-XXXX) * Extension

Email Address *

4. Upon completion of each Shareholder/Partner/Member Information page, select the Submit button.

Submit

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5. The form will redirect to the Section II summary page, listing each 20% or greater owner, which was submitted under the Shareholder/Partner/Member Information page.

Shareholder Information and Authorization

SECTION II: SHAREHOLDER / PARTNER / MEMBER INFORMATION

Select "Add Shareholder" to enter information for any owner that is a 20% or greater stakeholder, member, or partner in the business seeking tax compliance status. A summary of your entries will be shown below.

Note: The entity will be deemed non-compliant if any shareholder, partner, or member with a 20% or greater ownership interest fails the clearance for tax compliance. Incomplete or missing tax information will result in application non-compliance. Provide first and last names if ENTITY TYPE is a Sole Proprietor or an Individual.

[Add Shareholder](#)

Entity Name	First Name	Last Name	Ownership %	Email Address	
	Roger	Smith	25	RogerS@gmail.com	▼
	Roberta	Doe	75	RobertaD@gmail.com	▼

- The buttons on the Summary page may be selected to “edit” or “delete” the information on the table.

NOTE: The Add Shareholder Button must be selected for each 20% or greater owner.

Ownership Non-Compliance Notification

Due to taxpayer confidentiality, notification of non-compliance for a shareholder, member or partner will only be communicated directly to the non-compliant entity or individual. The applicant completing the clearance form will not receive notification from the Department of Revenue for ownership non-compliance issues.

SECTION III: AUTHORIZATION

1. The representative who has completed the compliance form is required to enter all information within this section and check the box that the information submitted on the form is true.

SECTION III: AUTHORIZATION

I declare under penalty of perjury that I am the owner, officer or member of the business for which tax clearance is requested and that the information is true. *

First Name *	Last Name *	
Address Line 1	Address Line 2	
City	State/Province	
Postal Code	Country ▼	
International Calling Code	Phone Number (XXX-XXX-XXXX) *	Extension
Email Address *		

2. The representative must also accept the terms to the E-Signature statement and select the "I ACCEPT" box. Failure to check the box will result in application not being processed.

e-Signature

I agree that by checking the "I Accept" box below, I am certifying that I am the owner, officer, or member of the business for which tax clearance is requested. I hereby warrant the information I am requesting is for lawful purposes and certify all statements made herein are true to the best of my knowledge and subject to 18 Pa. C.S. § 4904 (relating to unsworn falsification to authorities).

Further, I understand, agree, and acknowledge that by checking the "I Accept" box below I am signing this form electronically and consenting to this request being governed by Pennsylvania's Electronic Transactions Act, 73 P.S. § 2260.101, et seq. By completing this action, I understand and agree that the checked "I Accept" box constitutes my Electronic Signature (e-Signature), and my e-Signature is the legal equivalent of my handwritten signature.

I Accept

3. The representative has the option to select the Next button to move ahead to the Clearance Form Submission page or to select the Previous button, to edit Section I, II or III.

Previous	Next
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CLEARANCE FORM SUBMISSION

1. The clearance form submission page, allows the representative to review, edit, print and submit the clearance form to the Department of Revenue.

- To print the clearance form, select the Print button.

Step 3 of 3

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Review

Print

- To edit the clearance form, select the Previous button.

Previous

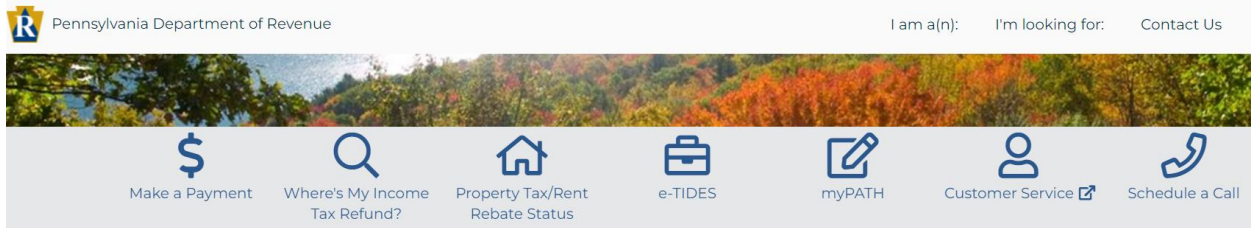
- To submit the clearance form, select the Submit button.

Review all information and print prior to submitting. You will receive an email confirmation once the tax clearance information is submitted.

Previous

Submit

2. Once the “SUBMIT” button is pressed, the representative will be routed to the Pennsylvania Department of Revenue website and a confirmation email will be sent to the email address listed in the Authorization section for the representative.



[Pennsylvania Department of Revenue](#) > [Forms and Publications](#) > Clearance Form for Tax Credit & Economic Development Programs Confirmation

Thank you for contacting the Pennsylvania Department of Revenue. We are in receipt of your tax clearance information and it is under review. If non-compliance issues are identified, the Department will contact the non-compliant entity or individual of the status and timeline for resolution.