

PA SCHEDULE SP
Special TAX BACK/Tax
Forgiveness
PA-40 Schedule SP (09-03) 2003

OFFICIAL USE ONLY

Name of taxpayer claiming TAX BACK/Tax Forgiveness (if filing a PA-40 jointly, enter the name shown first)
Social Security Number (shown first)
Spouse's Name (even if filing separately)
Spouse's Social Security Number

Part A. Filing Status for TAX BACK/Tax Forgiveness.

Unmarried. Fill in the Unmarried oval on Line 19a of your PA-40, and the oval that describes your situation.

Single. Unmarried on December 31, 2003. Fill in this oval if divorced.

Single and claimed as a dependent on another person's separate PA Schedule SP. Enter the other person's name(s) and SSN(s).

SSN: SSN: Name(s):

Separated. Fill in the Unmarried oval on Line 19a of your PA-40, only if: (a) you are separated pursuant to a written agreement and lived apart for the last six months of 2003, or (b) you were married, but separated and lived apart for the last six months of 2003.

Married. Fill in the Married oval on Line 19a of your PA-40, and enter your spouse's SSN and name above. Fill in the oval that describes your situation.

Married and claiming TAX BACK/Tax Forgiveness together with my spouse.

Married and filing separate PA tax returns. Certification. Fill in this oval certifying that you and your spouse are submitting the same information on each PA Schedule SP.

Married with a spouse who is a dependent on another person's PA Schedule SP or Federal Income Tax return. Enter the SSN(s) and name(s) of the person claiming your spouse.

SSN: SSN: Name(s):

Separated and lived apart from my spouse, but for less than the last six months of 2003. Enter spouse's SSN and name above.

Deceased. Fill in the Deceased oval on Line 19a of the PA-40. You must annualize the decedent's income - see the instructions. Fill in the Decedent's oval in Part C. Briefly explain the method you used to annualize the claimant's income here:

Part B. Dependent Children. Provide all of the information for each dependent child. Submit additional sheets in this format if needed.

Table with 4 columns: 1. Dependent's Name, Age, Relationship, Social Security No.

IMPORTANT: Only claim the child or children that you claimed as your dependent(s) on your 2003 Federal Income Tax return.

2. Number of dependent children for PA Schedule SP. Enter on Line 19b of your PA-40. 2.

Part C. Eligibility Income. If Unmarried or Separated, or for a Decedent, use the Your Income column.

Fill in this oval to show that you are reporting the decedent's annualized income.

If Married, use the Your Income and Spouse Income columns. Add the totals and use the Joint Income total. Report income that is not taxable for PA purposes on Lines 2 through 10. See the instructions.

Table with columns: Your, Spouse, and instructions for Eligibility Income Tables 1 and 2.

11. Total Eligibility Income. Add Lines 1 through 10. Enter on Line 20 of your PA-40.

Table with columns: Total, Total, Joint Income

Part D. Calculating Your TAX BACK/Tax Forgiveness.

Table with 16 rows for calculating tax liability and forgiveness credit.