# PSTAP - Practitioner Issue Reporting Form - PA DOR

### Please complete the applicable sections of this form and email to: sherry@pstap.org

#### **Section 1: Member Information**

* **Name:**
* **Business Name:**
* **Email:**
* **Phone:**

#### **Section 2: Type of Issue**

Select all that apply:

* Delay in processing returns or payments
* Notices and Letters
* myPATH system issues
* Filing and Payment Issues
* Policy and Procedure
* Delays -refunds, processing returns or payments
* Other (briefly specify): **\_**\_\_

#### **Section 3: Scope of the Issue**

* **Client-Specific** (affects one client or case)

**Taxpayer/Client Name:**

**Business Name:**

**Last 4 SSN** or Tax **ID (if applicable):** \_

**Tax Year(s)**  Involved:

* **Systemic** (affects multiple clients or appears to be a recurring issue)

**Approx. number of affected clients:**

**Are there specific policies or procedures that seem to contribute to this?:**

**Are you aware if other practitioners are experiencing the same issue?**

**Describe the pattern**, commonality or frequency **(1–2 sentences):**

#### **Section 4: Affected Tax Type**

* Personal Income Tax
* Sales & Use Tax
* Corporate Tax
* Employer Withholding
* Other: **\_**\_\_

#### **Section 5: Description of the Problem**

Provide a short summary (1–2 sentences) relevant information and dates/timeline

#### **Section 6: Impact Assessment: Provide a short statement about how this issue has affected the parties involved:**

#### **Section 7:  Action Taken So Far**

* I have contacted the Department of Revenue

**Date of Contact:** \_\_\_\_ **Method:** [ ] Phone [ ] Email [ ] myPATH [ ] Mail

**What was their response?**

* I have not contacted the Department of Revenue

#### **Section 8: Supporting Documents**

* Yes, I am attaching documents (relevant notices, letters, screenshots etc)
* No

#### **Section 9:  Are there upcoming deadlines or events that make this issue time-sensitive?**

* Yes (Please specify): \_\_\_\_\_\_\_\_\_\_
* No  \_\_\_\_\_\_\_\_\_\_

#### **Section 10:  What is your favored outcome or resolution?**